

# User Manual



## Password Vault Manager

Version 7.0

Your all-in-one solution platform for password management  
for your entire organization.

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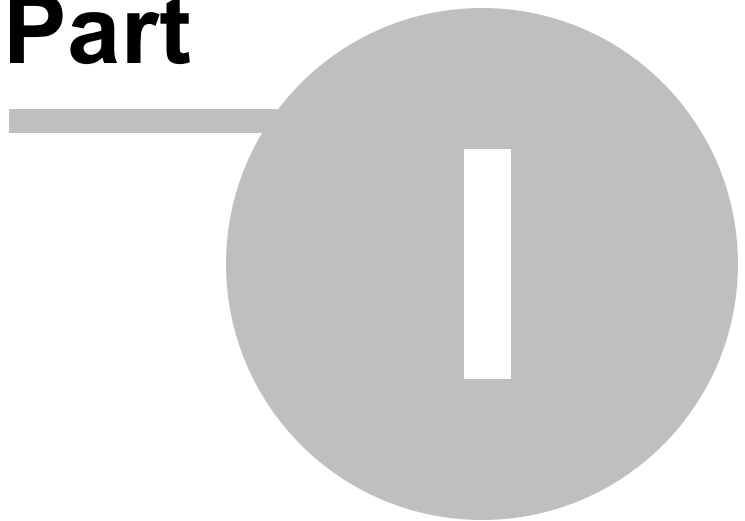
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## **Index 0**

# Getting Started

**Part**



# 1 Getting Started

## 1.1 What is Password Vault Manager?

### Description



Password Vault Manager is a product used to manage all of your passwords and your sensitive information.

Keep your credit card numbers, your bank accounts, your serial numbers or your alarm codes in an organized and secure database. Share with your team members only what they need to know and keep your data safe.

You can store the following types

- Web Site
- Credentials
- Bank information
- Credit card information
- Email account
- Alarm codes
- Note
- And more

## 1.2 System Requirements

### Minimum Requirements

- Windows XP (SP2 or later), 2003, Vista, 2008, 7, 8 and 2012
- Microsoft .Net Framework 4.0
- 100+ MB hard drive space

### 64-bit Support

Password Vault Manager is compatible with all 64-bit versions of Windows, starting with Windows Vista SP1.

### Terminal Services and Thin Client Support

Password Vault Manager can be installed on a Terminal Server machine, thin client and Windows XP Embedded as well.

## 1.3 Creating a New Data Entry

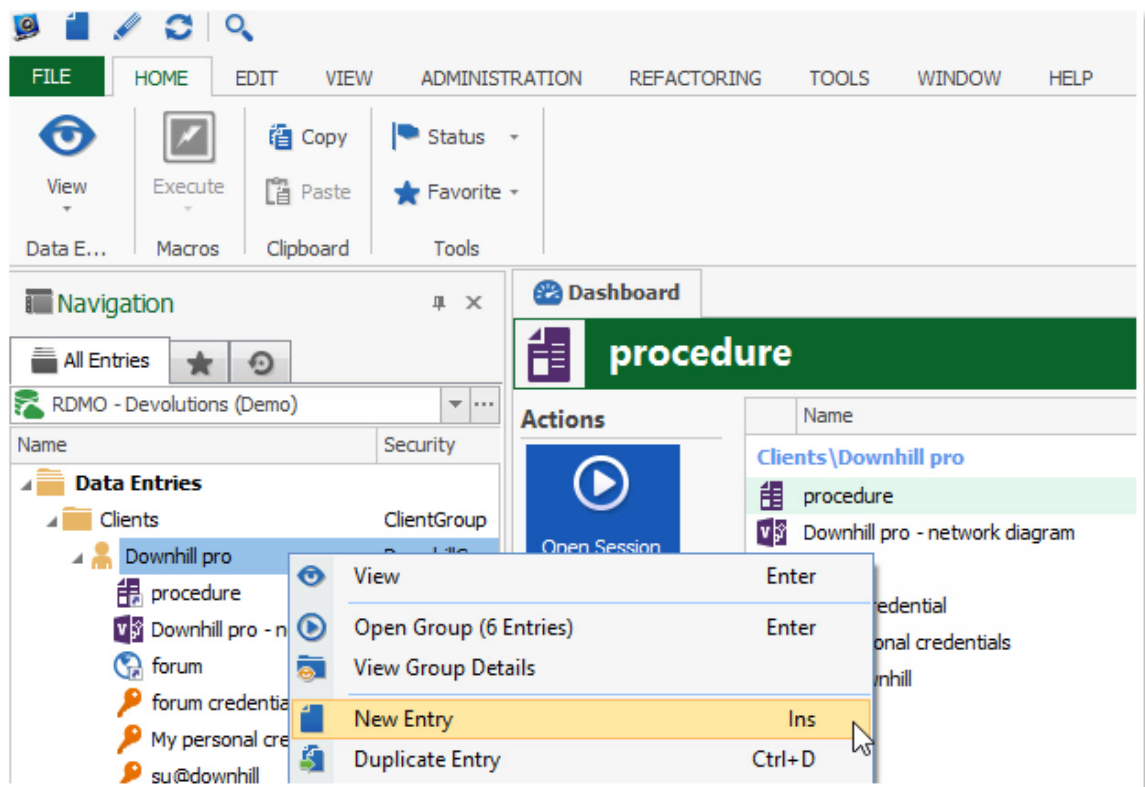
### Overview

To start using Password Vault Manager you must configure a data entry. There are many types of data entries; you should be familiar with the data entry type(s) that you plan on configuring. Password Vault Manager supports the following data entry types:

- Data Entry
- Contact
- Document
- Group/Folder
- Credentials

## Creating a Data Entry from the Context Menu

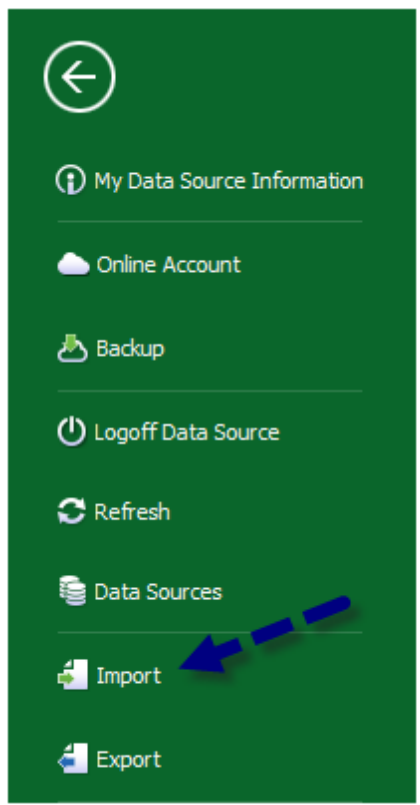
The easiest way to create a new data entry is by using the Insert key or from the Context Menu. On the main application window, simply right-click Data Entries and select New Entry from the menu. The new entry window will prompt for the entry type. Templates have been setup for many common web sites. Search through and choose the appropriate template or simply choose **Data Entry - Web** for a generic web site. You will be prompted with the data entry property window to customize your settings.



Adding a new data entry

## Creating a Data Entry by Importing its Configuration

You can also import a data entry by using the **File - Import**, or by importing its configuration directly from any compatible applications supported by our importing tools. To learn more about importing, see our [Import](#) topic.



Import data entries

## 1.4 Configuring a Data Entry

### Description

Each data entry type has its own specific settings. However, some common settings are shared.

Data entry edition dialog

## Settings

Description	
Name	The name of the data entry that appears in the data entries list.
Group/Folder	This is used to organize the session in different folders, either in the <a href="#">tray icon</a> context menu or in the tree view. Learn more <a href="#">here</a> .
Security Group	In the Enterprise edition, allows the Administrator to assign a security group to an entry, and therefore limit a subset of users to view this entry.
View URL embedded	View the Url of the web page for this entry. Url will be used to navigate to the web site.
Open in modal window	Will open the browser in a modal window.
Display	<p><b>External:</b> External mode session are opened as an external process.</p> <p><b>Embedded/Tabbed mode:</b> Will run within the confines of the Password Vault Manager window and displays the tabs at the top of the window.</p> <p><b>Undocked:</b> Will create a new window to contain the tabbed session and will</p>

	allow you to move it anywhere else.
Primary monitor	<p>If you have selected the Undocked mode in the Display option you will be able to chose in which monitor to open your window:</p> <p><b>Primary monitor:</b> This is the monitor that is marked as "main display" in Window.</p> <p><b>Secondary monitor:</b> The other non-primary monitor, obsolete, use Monitor #1, 2, 3, 4 instead.</p> <p><b>Current monitor:</b> The monitor that Password Vault Manager is running in.</p> <p><b>Configured:</b> See Systems Options.</p> <p><b>Default:</b> Will not move the application, it will be Windows default mode.</p> <p><b>Monitor #1:</b> Monitor #1 is primary.</p> <p><b>Monitor #2:</b> Monitor #2 is primary.</p> <p><b>Monitor #3:</b> Monitor #3 is primary.</p> <p><b>Monitor #4:</b> Monitor #4 is primary.</p>
Website	Enter the Url of the web page for this entry. Url will be used to navigate to the web site.
Machine name	Machine name. Used to store the host name vs the DNS name.
Employee	Employee name.

As well as the fields described above, additional tab pages contain many data fields and options for your sessions.

Description	
More	Contains the following sections : <a href="#">Description</a> , <a href="#">Other</a> and <a href="#">Keywords/Tags</a> . The entry description can be in plain text, in rich text format, or a website link.
Information	Contains different types of information related to the data entry, such as the machine specifications, <a href="#">Computer</a> , <a href="#">Contact</a> , <a href="#">Custom Fields</a> or some useful notes. Custom information can also be added.
Sub Connections	Contains the sub connections linked to this entry. It's possible to use variables that refer to this entry's fields, such as the host name, from within sub connections. This is useful for connecting to the same host with different protocols. Please see <a href="#">Sub Connections Overview</a> for more details.
Attachments	Manages the entry's attachments. Used to add, edit and delete the linked files. Please see <a href="#">Attachments Overview</a>
Logs	Contains the session logs and other related options. For example, entering a comment when opening a session can be made mandatory. Please see <a href="#">Log Options</a>
Advanced	Contains advanced settings related to the entry, such as the internal data source ID and session ID. These values can be used to invoke Password Vault Manager from a command line to open the entry, or to run a batch modification. Please see <a href="#">Advanced settings</a>

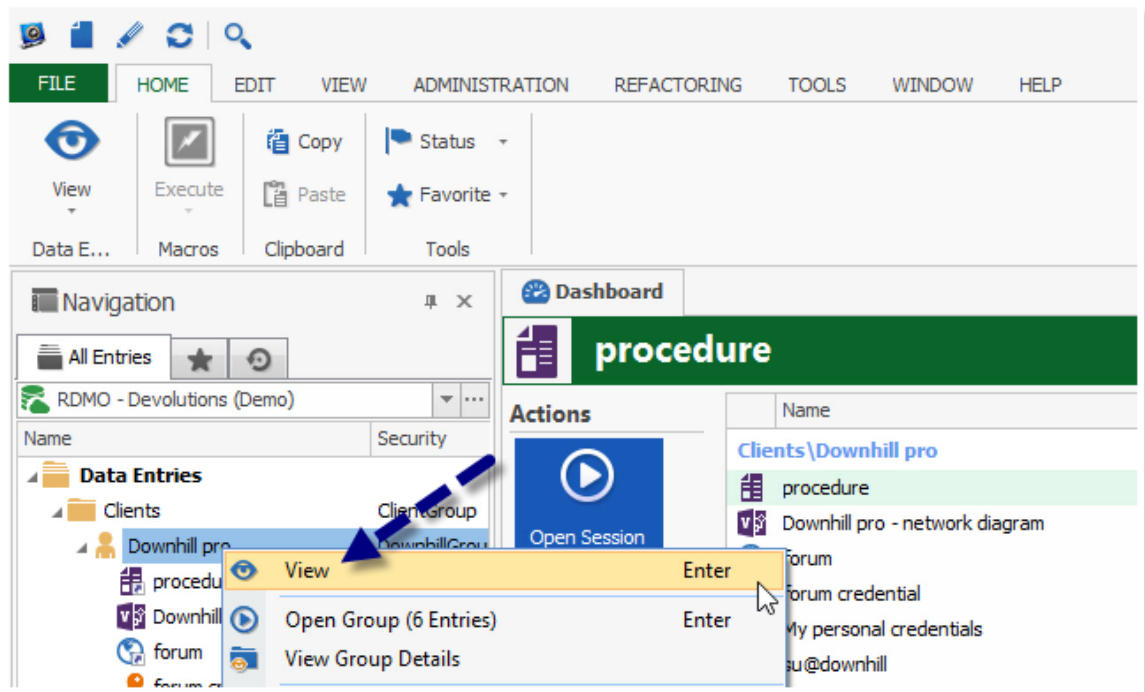
## 1.5 Viewing the Data

### Description

You may open a data entry by double clicking it in the data entries list, or by using the context menu.



If the **View embedded** option was selected, the view will open in the embedded mode within Password Vault Manager.

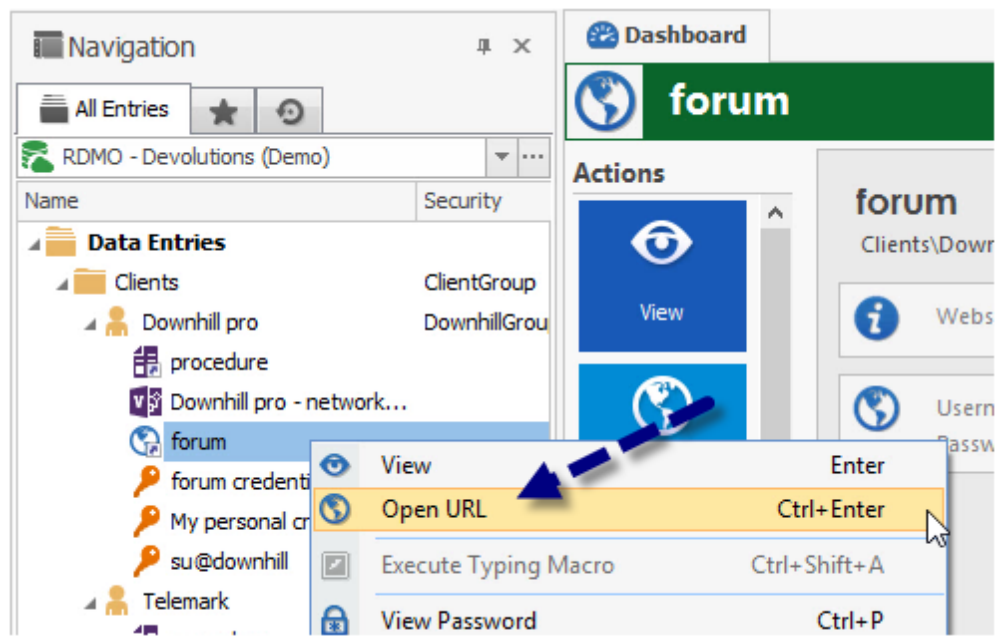


Opening an existing data entry

## 1.6 Opening Url

### Description

You may open web site by using the context menu **Open Url** or by using Ctrl+Enter while the item is selected.



Opening a web site

## Auto Fill

Auto fill of username and password is supported on most web sites and in most browsers. Plugins/Add-Ons/Extensions needs to be installed to support this feature.

Learn more about Auto Fill [here](#).

## 1.7 Group/Folder Management

### Description

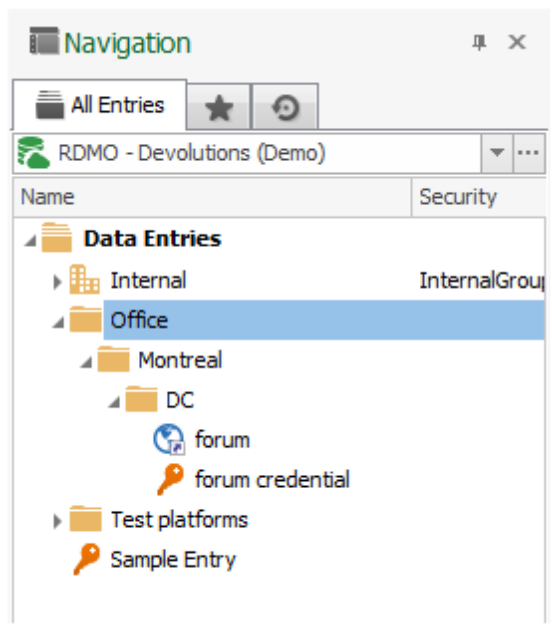
Groups or folders are used to organize your data entries in a logical way. It's possible to create groups and sub groups, which Password Vault Manager will automatically sort alphabetically.

Groups can be created in two different ways:

- Via the data entry properties
- From the data entry tree view

### Creating Groups via the Data Entry Properties

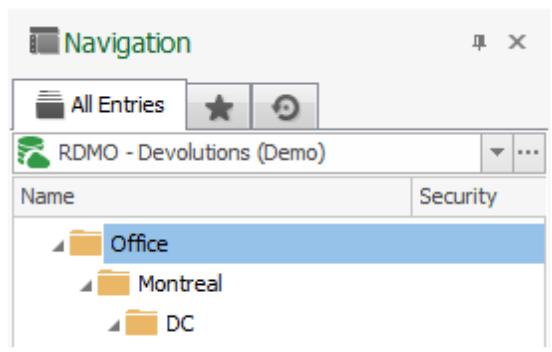
Groups can be specified in the session properties. Simply fill this field with your desired group name, and Password Vault Manager will generate the corresponding tree structure. Use the backslash ( \ ) to create a sub group.



**Basic group structure**

For example, "Office\Montreal\DC" will create three nodes in the tree:

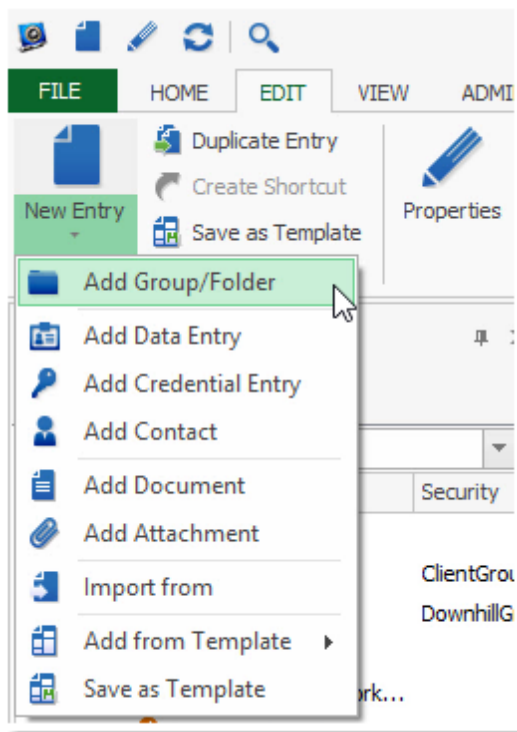
- Office
- Montreal
- DC



**Modified group structure with a new node**

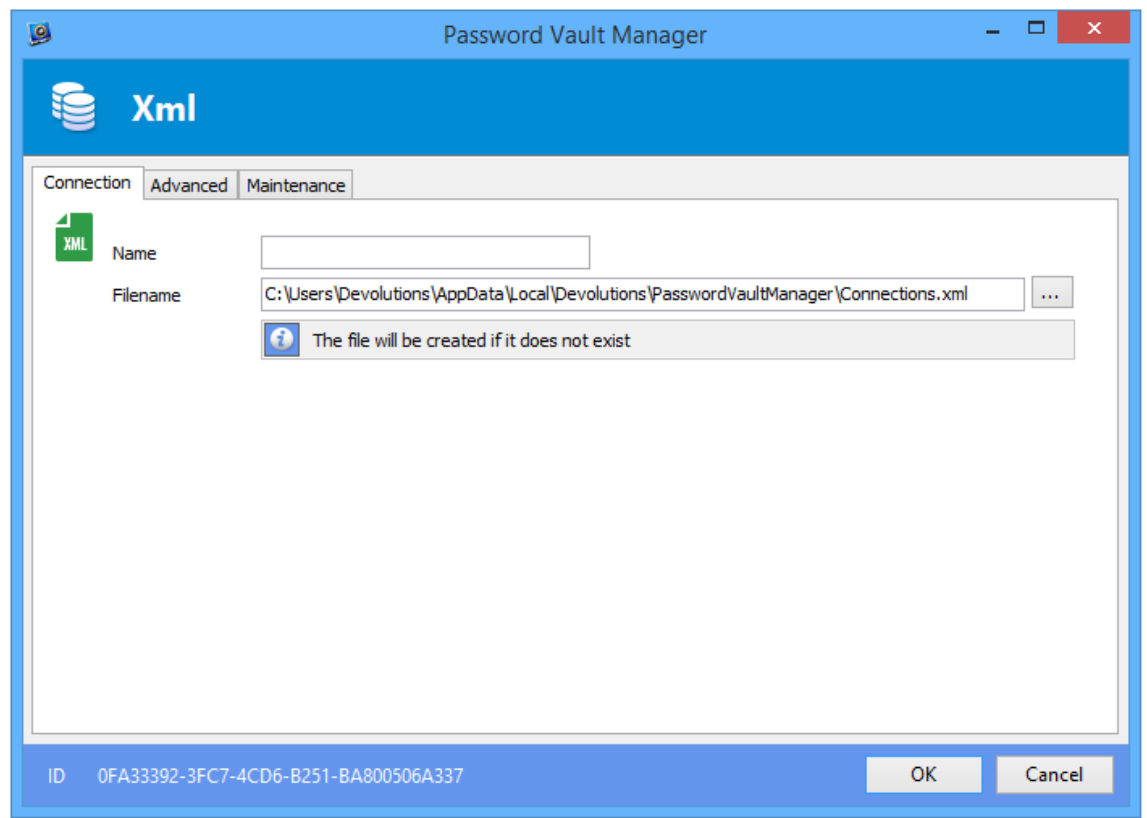
## Creating Groups from the Tree View

By right clicking the root node of a group or an existing data entry, a context menu appears allowing you to create a new group.



**Add group from the data entry context menu**

The **Add Group** dialog box will then prompt you to enter the name of the group, and choose its parent group.

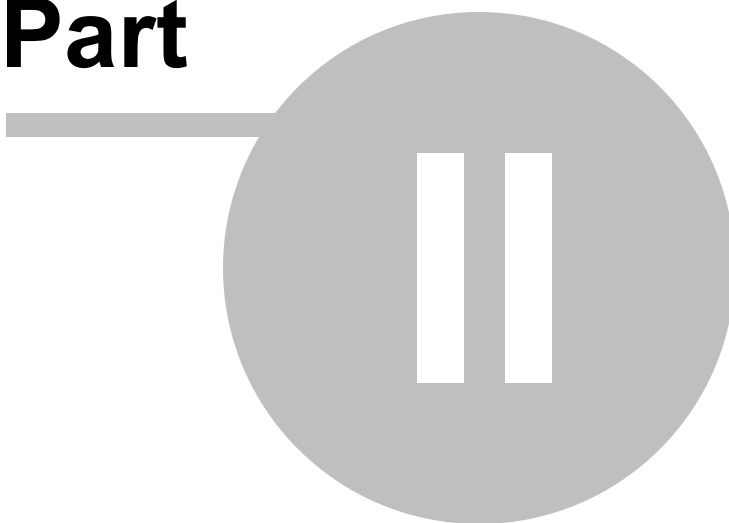


**Group edition dialog**

Once a group is created, you can add a data entry by using the menu, or by dragging its node directly to the content of the group.

# Installation

**Part**



## 2 Installation

### 2.1 Client

#### 2.1.1 Overview

##### Description

You can download Password Vault Manager either as a setup files or as a compressed (zip) file containing the binaries.

##### Installation

Depending on the downloaded media, either run the setup, or extract the files from the archive in any folder and launch the executable.

##### Licence

You have a 30 day trial of the Enterprise edition. If you possess a purchased license of the Enterprise Edition, please follow the instructions at [Register Enterprise Edition](#).

##### Data Source

By default, a local data source has already been created using the SQLite format. You can add as many data sources as you require, please see [Data Source Overview](#) for more information.



To use a SQL Server/SQL Azure data source, please read the [Configure SQL Server](#) topic.

##### Terminal Services

Password Vault Manager can also be installed on a Terminal Server, but to prevent loss of user settings, we recommend that you install the application in any folder except "**Program Files**" or "**Program Files (x86)**". The configuration and the default data source will be created in this folder instead of the "**Local Application Settings**" folder.

Please see [Configuration File Location](#) for more information.

#### 2.1.2 Configuration File Location

##### Default Location

Password Vault Manager saves its configuration in a file named **PasswordVaultManager.cfg**. This file contains all of the application settings and the configured data source. All of the data source settings are encrypted for security reasons.

If Password Vault Manager is installed in a sub folder of "**Program Files**" and is not running on a Terminal Server, the configuration is saved in "**%LocalAppData%\Devolutions\nPasswordVaultManager**".

If the application is running on a Terminal Server, the configuration is saved in "**%AppData%\Devolutions\PasswordVaultManager**". It uses the roaming profile to avoid multi-user conflicts.

In any other case, the configuration is saved in the installation folder. This allows you to install multiple versions of the application side-by-side, as long as you don't install it in a sub folder of "**Program Files**" (For more information on why – this is because of the "**Program Files**" virtualization introduced with Windows Vista: <http://support.microsoft.com/kb/927387>.)

## Override the Default Path

There are two possible ways to change the default option path:

1. Create a file named "**Override.cfg**" in the application folder. Password Vault Manager opens this file and reads the first line. It should contain the desired installation folder (without the option filename). If you wish to use the current installation path, put a dot in the file. Here are two examples:

Example	
c:\pvm	The config file is saved in a specific folder.
.	The dot is used to specify the Password Vault Manager installation folder.
%AppData%\Devolutions\PasswordVaultManager	Specify the application roaming data folder.



Having the configuration file in the installation folder allows you to run multiple versions of the application side-by-side.

2. By adding a key in the registry: **CurrentUser\SOFTWARE\PasswordVaultManager, OptionPath**. Set the desired path in the key **OptionPath**. Do not forget to exclude the option file name in the key.

## Default Configuration

If Password Vault Manager can't find the configuration file for a new user, it will automatically copy the file found in the application installation folder. This is useful to deploy the configuration in a Terminal Server environment. Moreover, the application will update the license key if a newer serial is found in the default configuration.

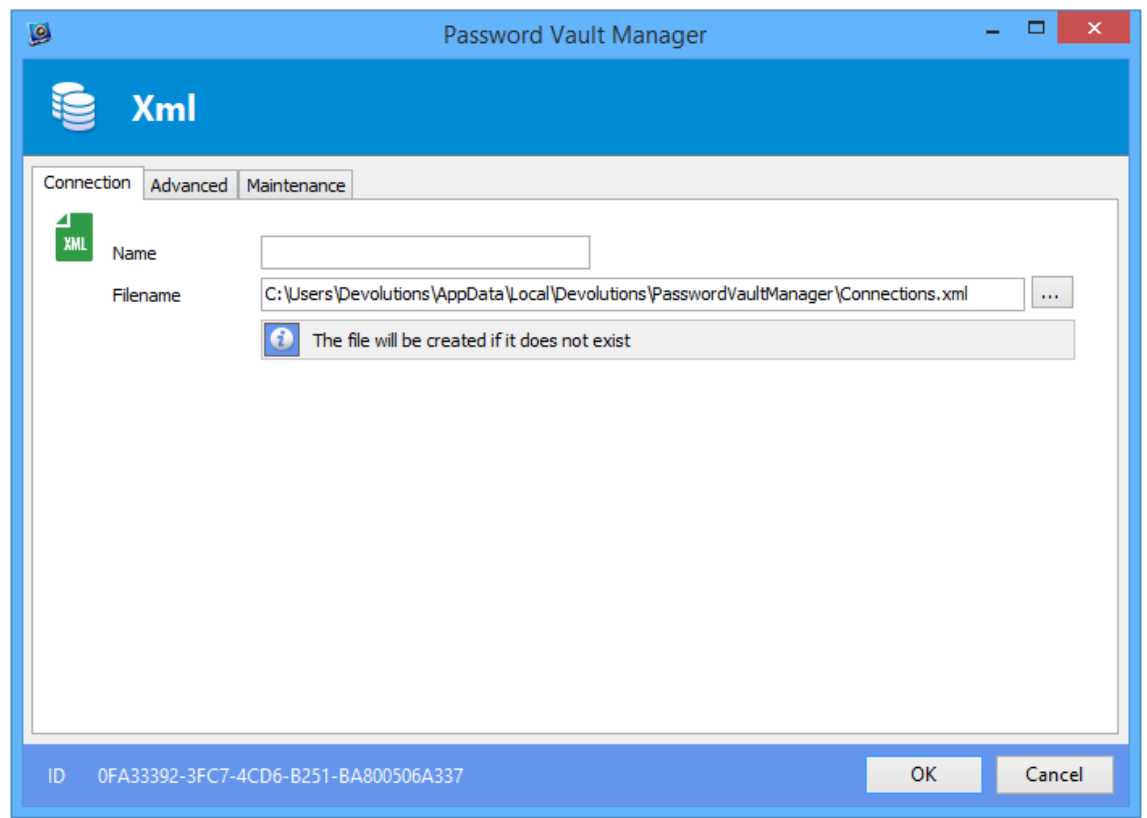
### 2.1.3 Portable (USB)

#### Description

Password Vault Manager can be used as a portable application. Here are some steps required to ensure that it runs correctly:

1. Unzip Password Vault Manager on the portable device
2. Open Password Vault Manager and configure the data source relatively to the portable device: .  
**\Connections.xml**





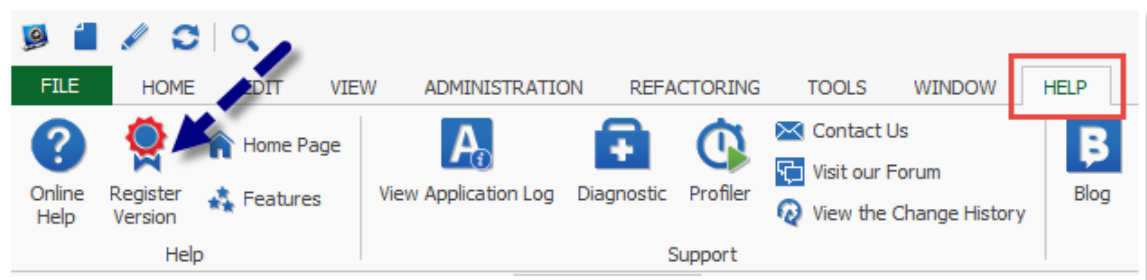
Data source saved on the portable device

## 2.1.4 Registration

### 2.1.4.1 Register Enterprise Edition

#### Instructions

To register or select a version, go in the menu **Help - Register Version**.

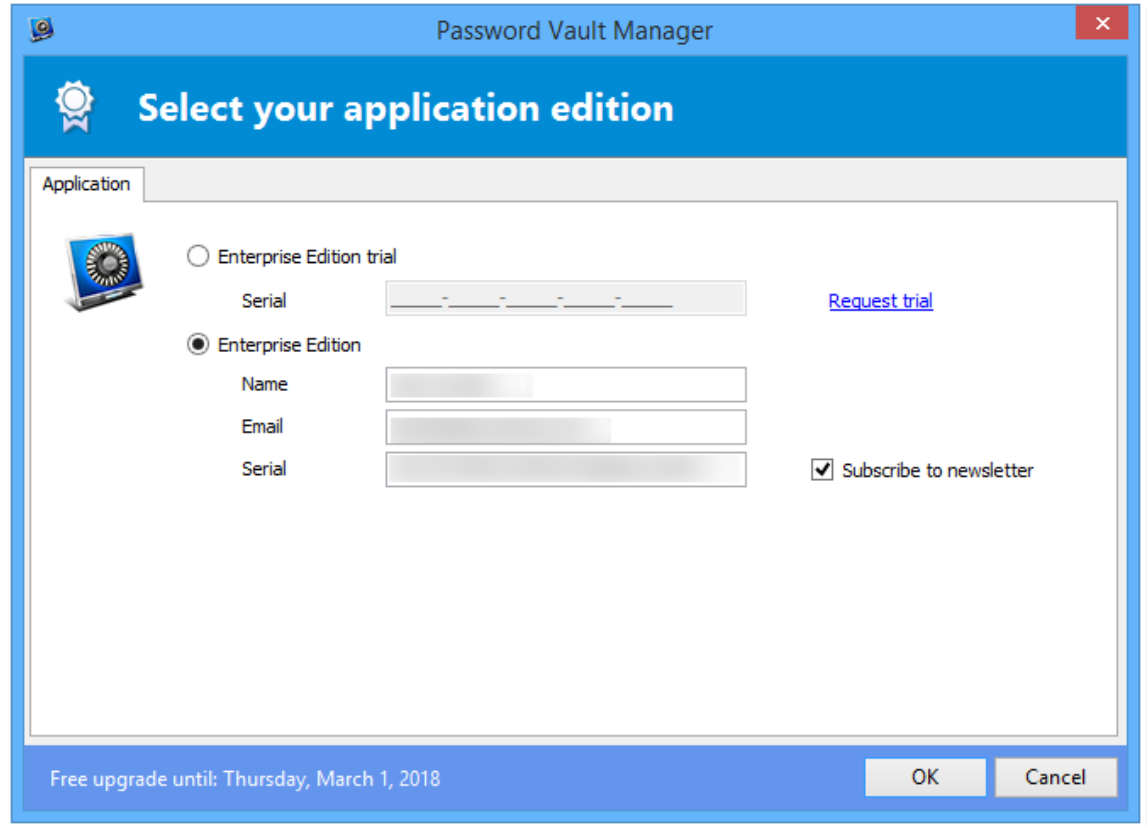


Register button

#### Enterprise Edition

After you receive our email with your serial number, you can register the application and unlock the Enterprise features.

Enter the user name and serial number exactly as noted in the email.



Application

☐ Enterprise Edition trial

Serial  [Request trial](#)

☒ Enterprise Edition

Name

Email

Serial  ☒ Subscribe to newsletter

Free upgrade until: Thursday, March 1, 2018

OK Cancel

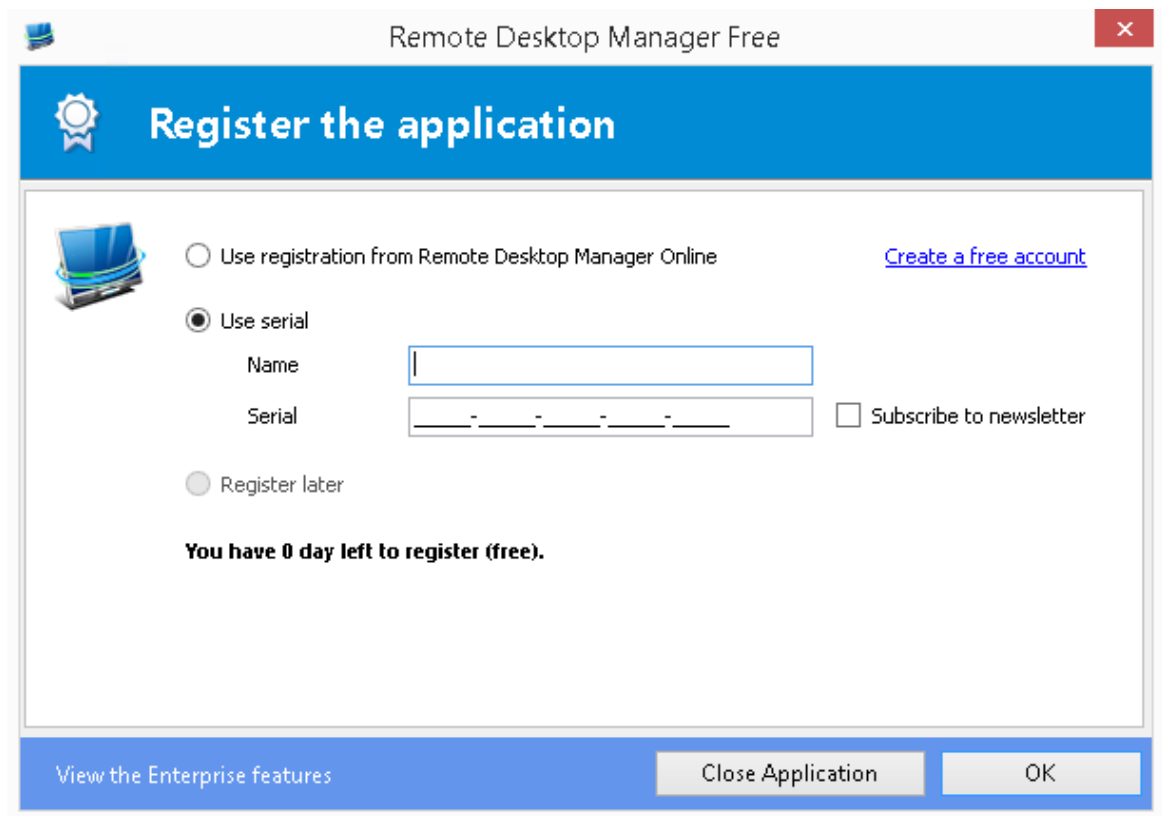
Registration Dialog

#### 2.1.4.2 Register Free Edition

##### Description

The Free Edition of Password Vault Manager is indeed free, but does require registration in order to use it. To allow you to test it fully before you even have to divulge your email address to us, we have granted a 30 day grace period during which no registration is necessary.

Upon every application launch, this dialog will appear. It presents the number of days left in the grace period, and the choice of source for registration data.



The screenshot shows the 'Remote Desktop Manager Free' registration window. The title bar includes the application icon, the text 'Remote Desktop Manager Free', and a red close button. The main content area has a blue header with a gear icon and the text 'Register the application'. Below this, there is a laptop icon and three radio button options: 'Use registration from Remote Desktop Manager Online' (with a link 'Create a free account'), 'Use serial' (selected), and 'Register later'. The 'Use serial' option has input fields for 'Name' and 'Serial' (with a hyphenated pattern). A checkbox for 'Subscribe to newsletter' is also present. A message states 'You have 0 day left to register (free)'. The bottom bar contains a blue button 'View the Enterprise features', a grey button 'Close Application', and a grey button 'OK'.

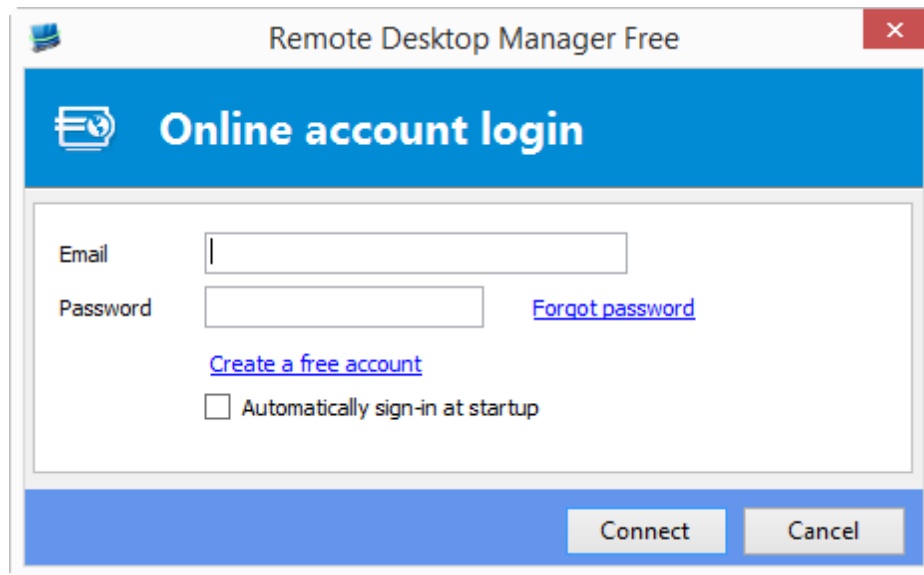
Registration Dialog

## Use registration from Remote Desktop Manager Online (RDMO)

Every holder of a RDMO account (which are also free) has been assigned licence keys for all of our free products. If you choose that option, upon pressing Ok a dialog will appear prompting for your login information. The license key will be obtained automatically. You can also use the hyperlink to create your free account.

### *Use an existing RDMO account*

As you can see in this image, you can enable **Automatically sign-in at startup**, this will be important if you use a RDMO [data source](#) or our [Online Backup service](#). Enter you account information and we will obtain the serial automatically.

The image shows a window titled "Remote Desktop Manager Free" with a red close button in the top right corner. Below the title bar is a blue header with a computer icon and the text "Online account login". The main area contains a login form with two input fields: "Email" and "Password". To the right of the "Password" field is a blue hyperlink "Forgot password". Below the "Password" field is another blue hyperlink "Create a free account". Underneath the links is a checkbox labeled "Automatically sign-in at startup". At the bottom right of the window are two buttons: "Connect" and "Cancel".

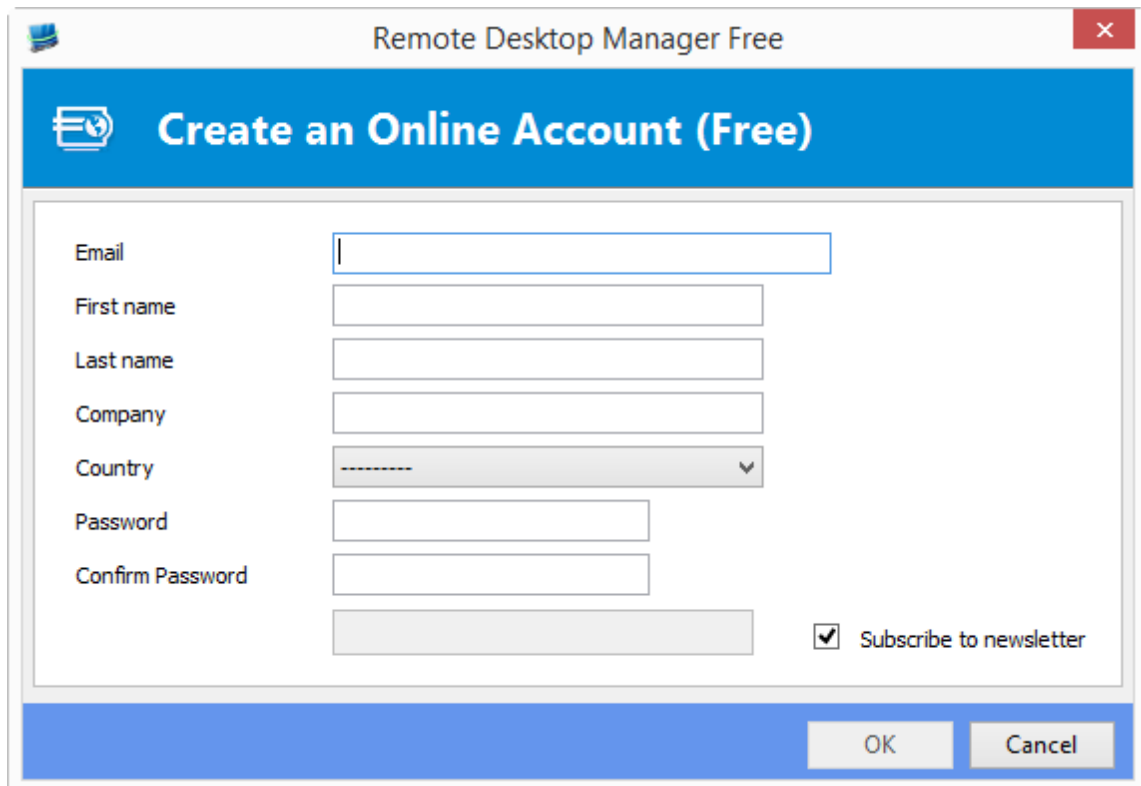
RDMO account login

**Create a new RDMO account**

Click on the **Create a free account** hyperlink in either of the above forms to display the following registration form.



RDMO Account registration is not complete until you have received the activation email and clicked on the **Activate** link. Attempting to complete the Remote Desktop Manager Free registration process will fail until you have confirmed your email address!

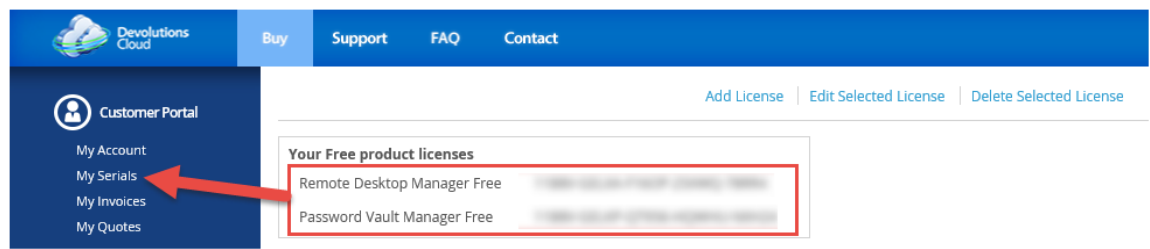


Create RDMO account

## Manually entering registration information

Sometimes you have gotten a licence key through our support or sales channels, or maybe you need to register the product on a **computer that does not have internet access**. Under these conditions you must enter the information manually.

If you need to obtain the serial from the RDMO account, login to <https://cloud.devolutions.net/> and click on the Serials button at the lower left. This will display your serials for the **Free Editions** of both **Remote Desktop Manager** and **Password Vault Manager**.



RDMO Serials Section

## 2.2 Database

### 2.2.1 Upgrade

#### Description

This topic applies to installations with data sources that are using a database as their data store.

Some releases must modify the database structure. These are performed automatically for you but it is a best practice to perform a backup of your data source beforehand. Additionally If you are in a team environment you must be the sole user connected to the database during the upgrade.

Follow these steps for a successful version upgrade:

1. Ensure you are the sole user of the database during the upgrade process.
2. Backup your database using the DBMS tools.
3. Open RDM while logged in as a user with administrative rights. You must also be SYSDBA or DB\_OWNER.
4. You may be prompted with an upgrade message when your data source is accessed. If so accept the upgrade.
5. Update the client software on all workstations.

## 2.3 Others

### 2.3.1 Configure SQL Server

#### Server Computer

1. Install or unzip Password Vault Manager Enterprise on the machine.
2. Install SQL Server or SQL Server Express (this version is free) with the administrative user named "sa". Therefore it has to be configured in Mixed mode authentication.



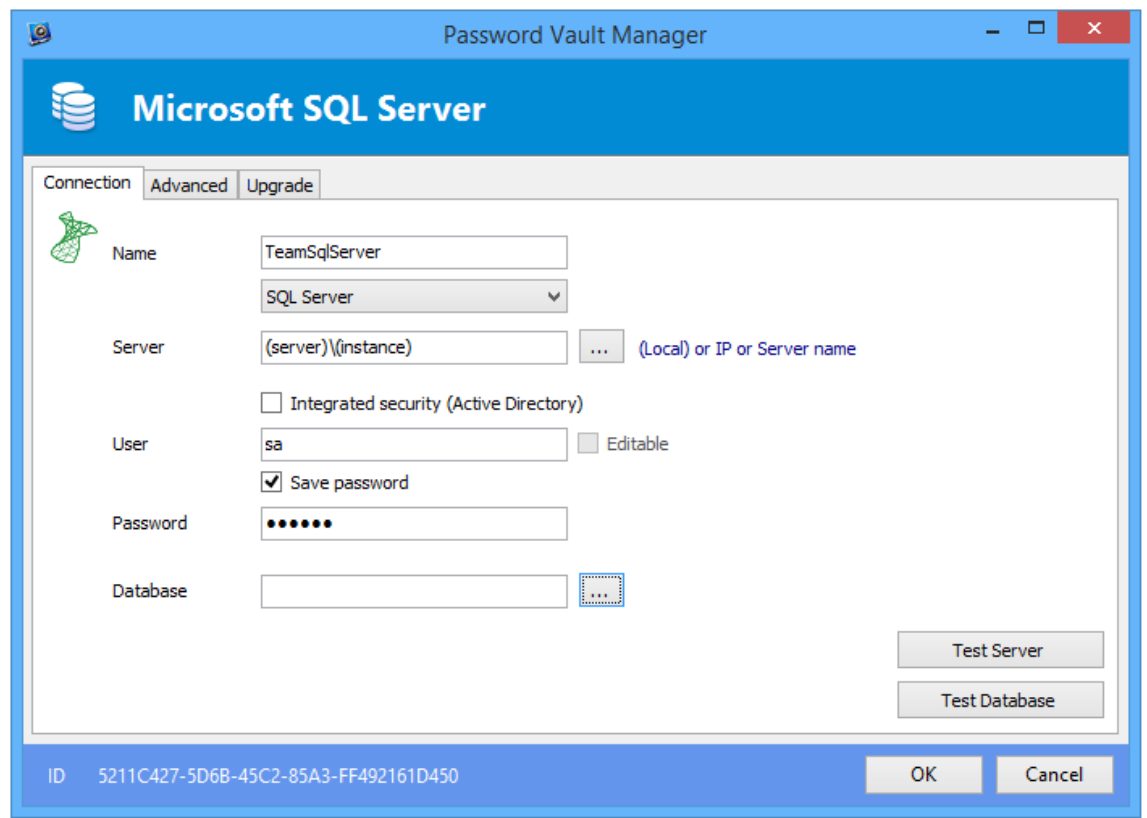
Newly installed SQL Server instances do not allow remote connections. Please follow the directions in [SQL Server](#).

3. To create an empty database, select **File - Data Sources**, select **New** then choose Microsoft SQL server in the list.



To create the Password Vault Manager database, you must use the "sa" user, domain users are not supported yet.

4. Configure the connection with the "sa" user and test the connection using **Test server**.



SQL Server/SQL Azure data source configuration

5. Enter a name for the database and click Create Database.
6. Create and configure security access for any other user needed in Password Vault Manager **File - Administration - Users**

## Client Computer

1. Install or unzip Password Vault Manager Enterprise on the machine.
2. Configure Password Vault Manager to connect directly to the SQL Server (use the machine name and SQL Server instance name).
3. You can configure the connection in the menu: **File - Data Sources**.
4. Click on Add SQL Server Data source.
5. Configure the connection settings and test the connection.

## 2.4 Uninstall

### Instructions

Password Vault Manager doesn't install anything in the Windows directory, and the only registry settings created are for the auto run and the installation path. As a result, Password Vault Manager can be

uninstalled easily.

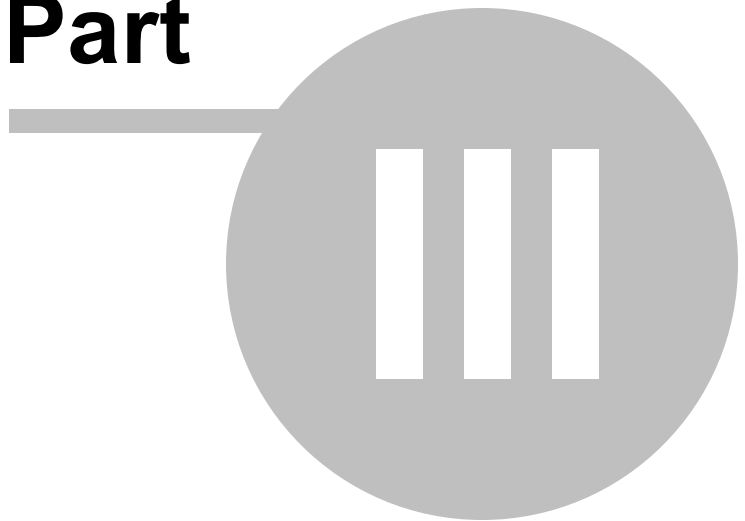
You can run the uninstaller if it was installed with the default setup file, or delete the installation folder directly if it was installed from the binaries.

You can also manually delete the content of "**%LocalAppData%\Devolutions  
PasswordVaultManager**" or "**%AppData%\DevolutionsPasswordVaultManager**"



# Data Sources

**Part**

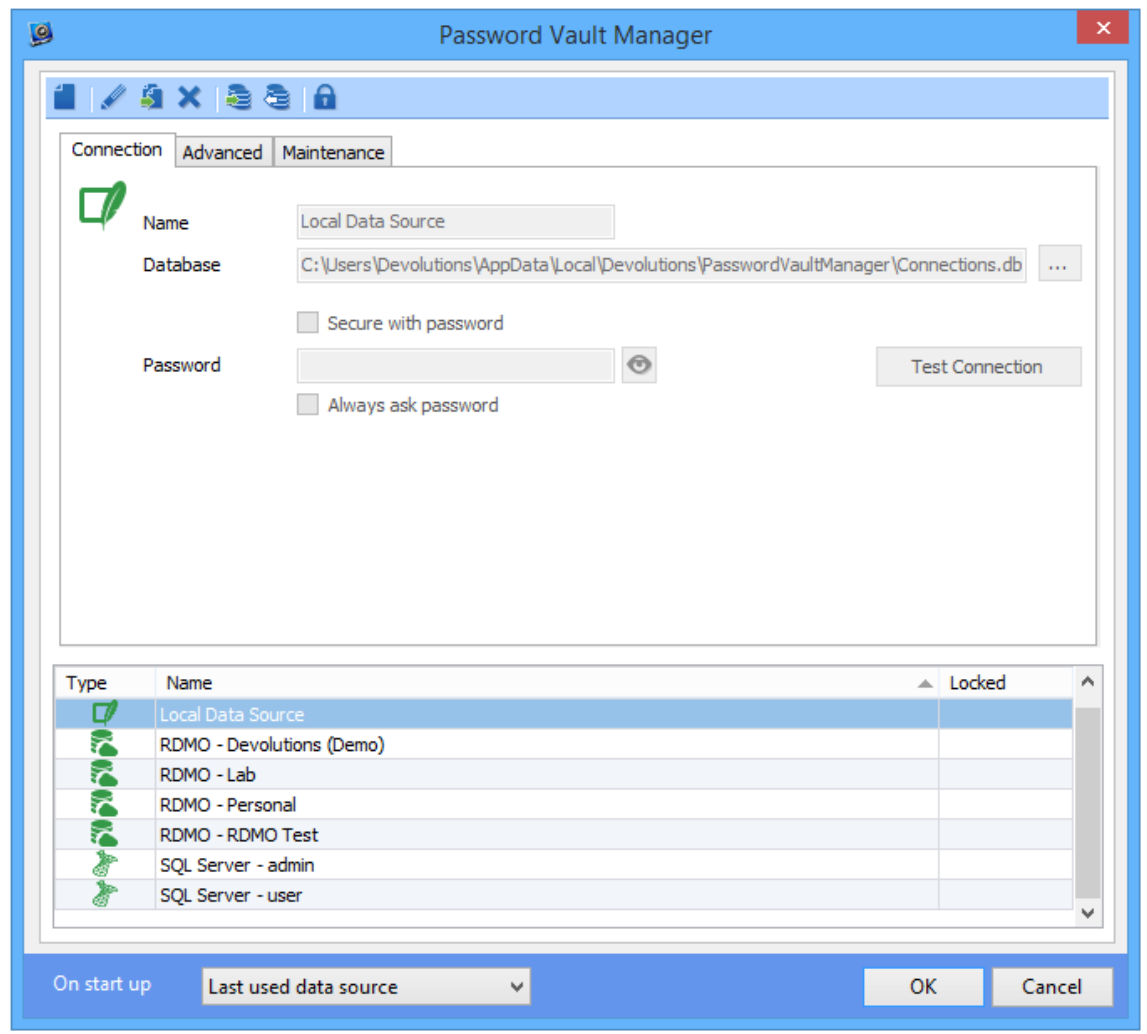


## 3 Data Sources

### 3.1 Overview

#### Description





All entries are saved in a data source and a data source is a file or database. Password Vault Manager supports multiple types of data source. To start, decide which data source you'll be using. If you're running the Standard edition, you'll be running from the local data source (which is an Xml database by default).












Data source options



#### Data Source Types

Name	Description	Pros and cons
Amazon S3 storage	Password Vault Manager saves the settings in a file located in an Amazon	Pros: <ul style="list-style-type: none"> <li>• Can be shared in read-only mode</li> </ul>

	<p>S3 bucket.</p> <p>Amazon S3 is a storage service for the Internet. It's designed to make web-scale computing easier for everyone.</p> <p>Amazon S3 provides a simple web services interface that can be used to store and retrieve any amount of data, at any time, from anywhere on the web, and Password Vault Manager use its API to persist your session settings.</p> <p>More details on cloud computing and Amazon S3 can be found at: <a href="http://aws.amazon.com/s3/">http://aws.amazon.com/s3/</a></p> <p>For more information, please consult <a href="#">Amazon S3</a> topic.</p>	<ul style="list-style-type: none"> <li>• Backups (by Amazon) are automatic</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• You must have an Amazon account and pay storage fees</li> <li>• No security management</li> <li>• There is a possibility for conflict or data corruption to occur</li> <li>• Doesn't support all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a> and <a href="#">Security Management</a>.</li> </ul>
<p>Devolutions Server</p> 	<p>Password Vault Manager uses Devolutions Server to store session information.</p> <p>For more information, please consult Devolutions Server topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Quick</li> <li>• Reliable</li> <li>• Secure</li> <li>• Supports all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a>, <a href="#">Offline Mode</a> and <a href="#">security access</a></li> <li>• SQL Server Express is free</li> <li>• Active Directory integration</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• SQL Server needs to be installed</li> </ul>
<p>Dropbox</p> 	<p>Password Vault Manager uses the Dropbox API to retrieve the XML file from the configured repository.</p> <p>For more information, please consult <a href="#">Dropbox</a> topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Can be shared in read-only mode</li> <li>• Backups (by Dropbox) are automatic</li> <li>• Storage infrastructure is free</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• No security management</li> <li>• There is a possibility for conflict or data corruption to occur</li> <li>• Doesn't support all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a> and <a href="#">security access</a></li> </ul>
<p>FTP</p> 	<p>Password Vault Manager uses an FTP connection to retrieve the XML file.</p> <p>For more information, please consult <a href="#">FTP</a> topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Can be shared in read-only mode</li> <li>• Easy to deploy online</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• No security management</li> <li>• There is a possibility for conflict or data</li> </ul>

		<p>corruption to occur</p> <ul style="list-style-type: none"> <li>Doesn't support all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a> and <a href="#">security access</a></li> </ul>
<p>Maria DB</p> 	<p>Password Vault Manager uses MariaDB as a drop-in replacement for MySQL.</p> <p>For more information, please consult MariaDB topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>Quick</li> <li>Reliable</li> <li>The database is free and can be installed on Linux</li> <li>Supports all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a>, <a href="#">Offline Mode</a> and <a href="#">security access</a></li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>MySQL needs to be installed</li> </ul>
<p>Microsoft Access</p> 	<p>Password Vault Manager saves the settings in a Microsoft Access database on the local machine, or on a network share.</p> <p>Microsoft Access is a pseudo relational database management system from Microsoft, which combines the relational Microsoft Jet Database Engine with a graphical user interface and software development tools.</p> <p>Access is no longer supported by Microsoft, this option is not possible on newer operating systems. For more information, please consult <a href="#">Microsoft Access</a> topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>Easy setup</li> <li>Can be shared</li> <li>Easy backup</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>Slower than SQL Server</li> <li>No security management</li> <li>There is a possibility for conflict or data corruption to occur</li> <li>Doesn't support all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a> and <a href="#">security access</a></li> </ul>
<p>Microsoft SQL Azure</p> 	<p>Remote Desktop Manager uses the Microsoft cloud platform to save and manage all sessions.</p> <p>For more information, please consult <a href="#">SQL Azure</a> topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>Quick</li> <li>Reliable</li> <li>Secure</li> <li>Supports all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a>, <a href="#">Offline Mode</a> and <a href="#">security access</a></li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>Microsoft Azure needs to be configured</li> </ul>
<p>Microsoft SQL Server</p> 	<p>Password Vault Manager uses the power of SQL Server to save and manage all sessions. This is the recommended data source for a multi-user environment.</p> <p>For more information, please consult <a href="#">SQL Server</a>.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>Quick</li> <li>Reliable</li> <li>Secure</li> <li>Supports all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a>, <a href="#">Offline Mode</a> and <a href="#">security access</a></li> </ul>

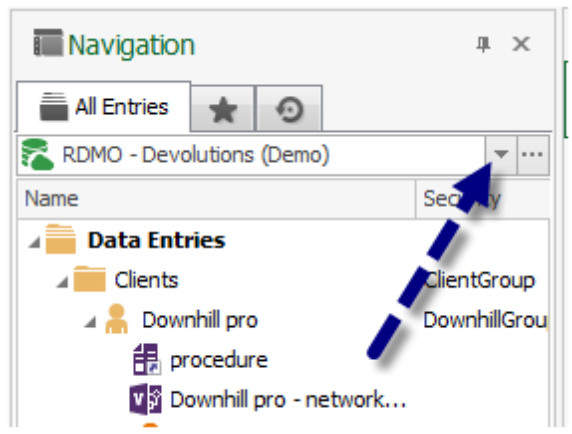
	<p><b>Note:</b> SQL Server 2000 is not supported.</p>	<ul style="list-style-type: none"> <li>• SQL Server Express is free</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• SQL Server must be installed</li> </ul>
<p>MySQL</p> 	<p>Password Vault Manager uses a mySQL database to store session information.</p> <p>For more information, please consult <a href="#">MySQL</a>.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Quick</li> <li>• Reliable</li> <li>• The database is free and can be installed on Linux</li> <li>• Supports all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a>, <a href="#">Offline Mode</a> and <a href="#">security access</a></li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• MySQL needs to be installed</li> </ul>
<p>Online Database</p> 	<p>Password Vault Manager connects to Devolutions' online repository.</p> <p>Note that there are different subscription levels for that product.</p> <p><b>Basic</b> and <b>Standard</b> are appropriate for individuals, whereas the <b>Professional</b> and <b>Enterprise</b> editions are for teams.</p> <p>For more information, please consult Online Database topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Quick</li> <li>• Reliable</li> <li>• Secure</li> <li>• Depending on the subscription level, supports all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a>, <a href="#">Offline Mode</a> and <a href="#">security access</a></li> <li>• </li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• Not hosted internally</li> </ul>
<p>Online Drive</p> 	<p>Remote Desktop Manager uses Devolutions Online Drive to store and synchronize your sessions. Access your sessions from anywhere using a simple Internet connection.</p> <p>For more information, please consult Online Drive topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Quick</li> <li>• Reliable</li> <li>• The service is free</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• No possibility for sharing</li> <li>• No security management</li> </ul>
<p>SFTP</p> 	<p>Remote Desktop Manager uses a Secure FTP connection to retrieve the XML file.</p> <p>For more information, please consult SFTP topic.</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>Can be shared in read-only mode</li> <li>Easy to deploy online</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>• No security management</li> <li>• There is a possibility for conflict or data corruption to occur</li> <li>• Doesn't support all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a> and <a href="#">security access</a></li> </ul>
<p>SQLite</p> 	<p>Remote Desktop Manager uses a SQLite database to store session information.</p> <p>For more information, please consult</p>	<p>Pros:</p> <ul style="list-style-type: none"> <li>• Quick</li> <li>• Reliable</li> <li>• The database is free</li> </ul>

	SQLite topic.	<ul style="list-style-type: none"> <li>Supports all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a>, <a href="#">Offline Mode</a> and <a href="#">security access</a></li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>No possibility for sharing</li> <li>No security management</li> </ul>
XML file storage 	Password Vault Manager saves the settings directly in a file with the XML format.	<p>Pros:</p> <ul style="list-style-type: none"> <li>Easy backup</li> <li>Can be edited manually or by an external system</li> <li>Nothing to install</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>No possibility of sharing</li> <li>No security management</li> <li>There is a possibility for conflict or data corruption to occur</li> <li>Doesn't support all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a> and <a href="#">security access</a></li> </ul>
Web 	Password Vault Manager uses a Web connection to retrieve the XML file.	<p>Pros:</p> <ul style="list-style-type: none"> <li>Easy backup</li> <li>Can be edited manually or by an external system</li> <li>Nothing to install</li> </ul> <p>Cons:</p> <ul style="list-style-type: none"> <li>No possibility for sharing</li> <li>Read-only</li> <li>Doesn't support all features, such as <a href="#">attachments</a>, <a href="#">connection logs</a> and <a href="#">security access</a></li> </ul>

## Multiple Data Sources

In the Enterprise edition, you can configure multiple data sources within the application. These data sources can be mixed, but there can only be one active data source at a time.

It's also possible to switch from one data source to another via the data source combo box. You may assign a default data source in the data source dialog. The default data source will be open when Password Vault Manager starts.



Choose your current data source

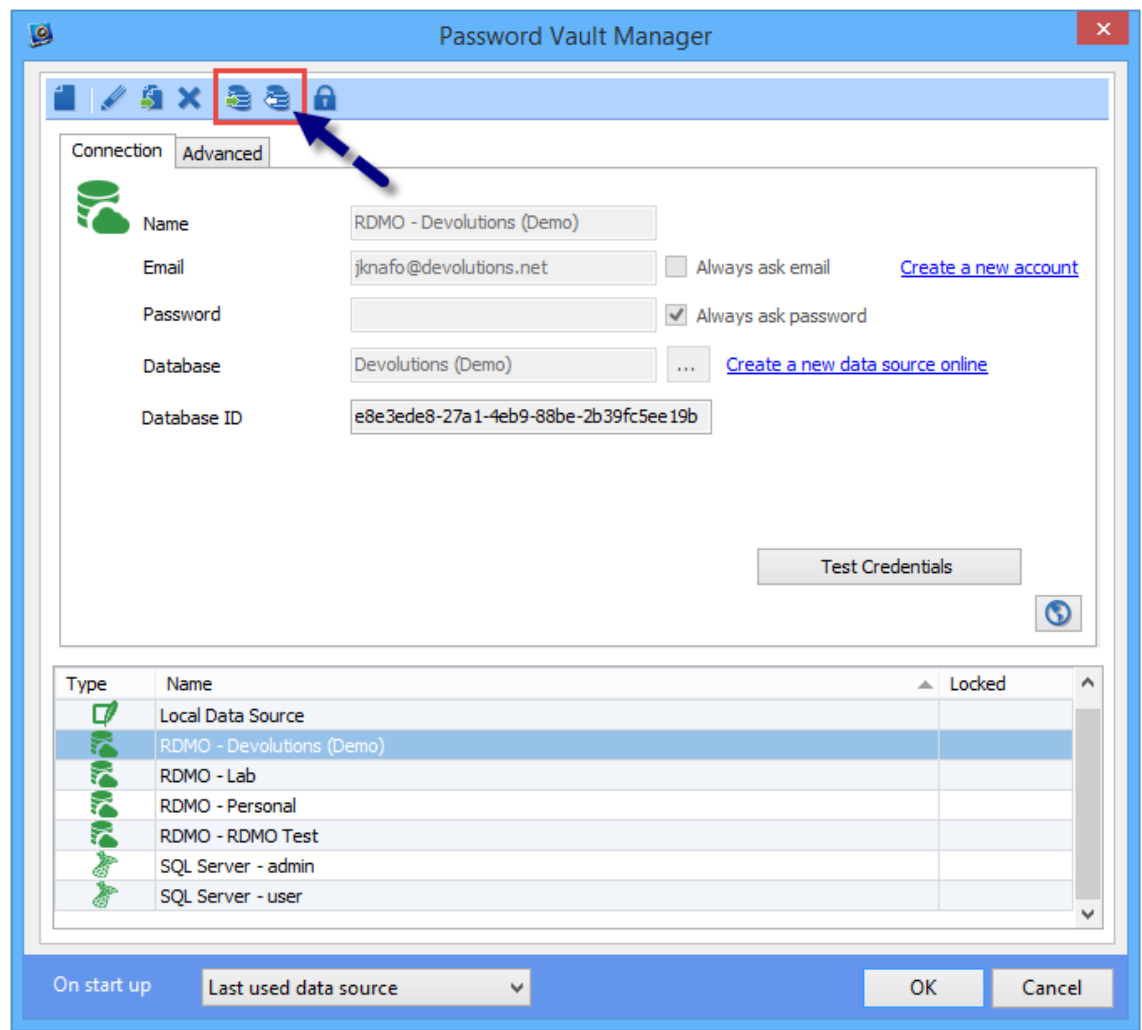
## Data Source Settings

See this [topic](#) for more details

## 3.2 Import/Export Data Source

### Import/Export Data Source

You can simplify deployment for multiple users by importing or exporting the data source. The generated file will have an .rdd extension. Password Vault Manager allows you to export the online data source settings directly to an .rdd file. So to do this, simply open the data source dialog (**File - Data Sources...**) to import or export the file.



**Import / export data source toolbar**

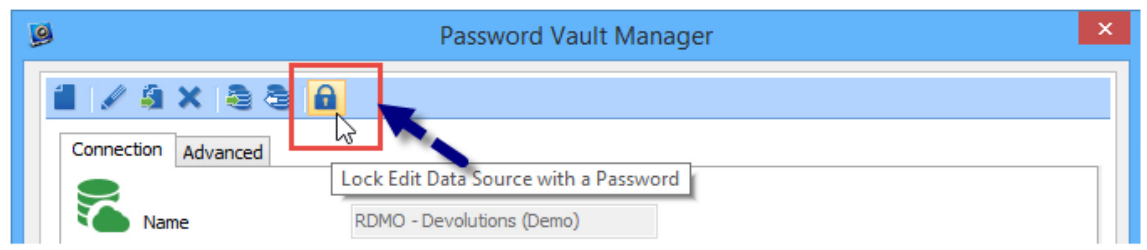
Also, a locked data source can be exported and imported, but its content will not be accessible unless a password is entered. See [Lock Data Source](#) for more information.

### 3.3 Lock Data Source

#### Lock Data Source

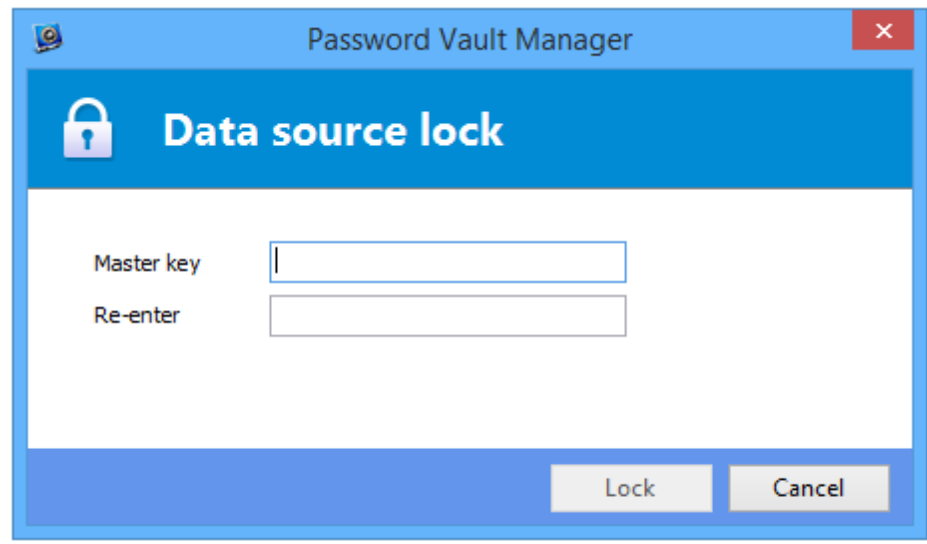
To protect sensitive data in your data source configuration (e.g. server URL or credentials), you may wish to lock the data source before you install it for you users. You can do this by using the Lock/Unlock button from the toolbar.





Lock data source toolbar

The locked data source will require a password. The password must be set when the lock is applied.



Lock data source dialog



There is **NO way** of unlocking the data source if the password is lost or forgotten. In such an event, you will need to configure a new data source.

## 3.4 Types

### 3.4.1 Amazon S3

#### Description



Password Vault Manager saves the settings in a file located in an Amazon S3 bucket. Amazon S3 is storage for the Internet. It is designed to make web-scale computing easier for everyone.

Amazon S3 provides a simple web services interface that can be used to store and retrieve any amount of data, at any time, from anywhere on the web and Password Vault Manager uses this API to persist your session settings.

More details on cloud computing and Amazon S3 can be found at: <http://aws.amazon.com/s3/>

## Highlights

- This data source can be shared over the Internet between multiple locations.
- This is a file-based data source, based on the XML data source



Although it can be shared between multiple locations, there is no conflict management for the configuration. If you share with other users you may get update conflicts and run into issues. This data source type is meant for a single user using multiple computers, not multiple users.

## Settings

Consult [Amazon S3](#) settings for more information on the configuration.

### 3.4.1.1 Settings

## Settings

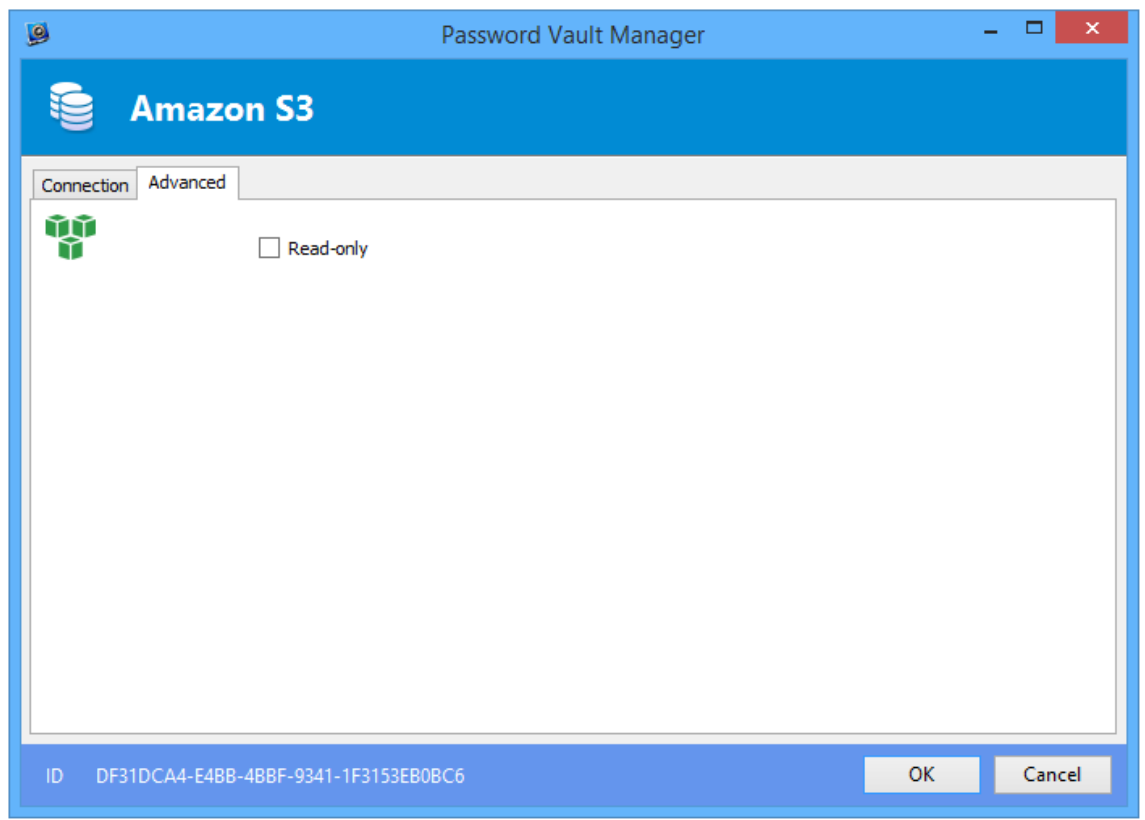
### Connection

The screenshot shows a window titled "Password Vault Manager" with a blue header bar. Below the header, there's a section titled "Amazon S3" with a database icon. The window has two tabs: "Connection" and "Advanced", with "Advanced" currently selected. The "Advanced" tab contains several input fields: "Name" (filled with "Amazon S3"), "Access key ID", "Secret access key", "Bucket name", and "Key name (filename)" (filled with "connections.xml"). Below these fields is a checkbox with a blue information icon and the text "The file will be created if it does not exist". At the bottom of the window, there's a status bar showing an ID "DF31DCA4-E4BB-4BBF-9341-1F3153EB0BC6" and two buttons: "OK" and "Cancel".

**Amazon S3 Connection tab**

Option	Description
Name	Name of the data source.
Access key ID	Contains the Amazon S3 Access Key ID.
Secret access key	Contains the Amazon S3 Secret access ID.
Bucket name	Name of the bucket created on Amazon S3 website and used by the application.
Key name (filename)	Name of the file that will used be store the data on Amazon S3.

**Advanced**



Amazon S3 Advanced tab

Option	Description
Read-only	Set the data source in read only. No new entry can be created and the existing data cannot be edit.

### 3.4.2 Dropbox

#### Description



Password Vault Manager uses the Dropbox API to retrieve the XML file from the configured repository. There is no need to install the Dropbox client on the machine to open the data source. It is also possible to configure more than one Dropbox account on the same machine.

#### Highlights

- This data source can be shared over the Internet between multiple locations
- The data source supports auto refresh
- This is a file-based data source, based on the XML data source
- To avoid data corruption, the session list should be modified in one location at a time
- No need to have the Dropbox client installed to use the Dropbox data source
- Each Dropbox data source can use a different Dropbox account



Although it can be shared between multiple locations, there is no conflict management for the configuration. If you share with other users you may get update conflicts and run into issues. This data source type is meant for a single user using multiple computers, not multiple users.

## Settings

Consult [Dropbox settings](#) for more information on the configuration.

### 3.4.2.1 Settings

## Settings

### Connection

#### Dropbox Connection tab

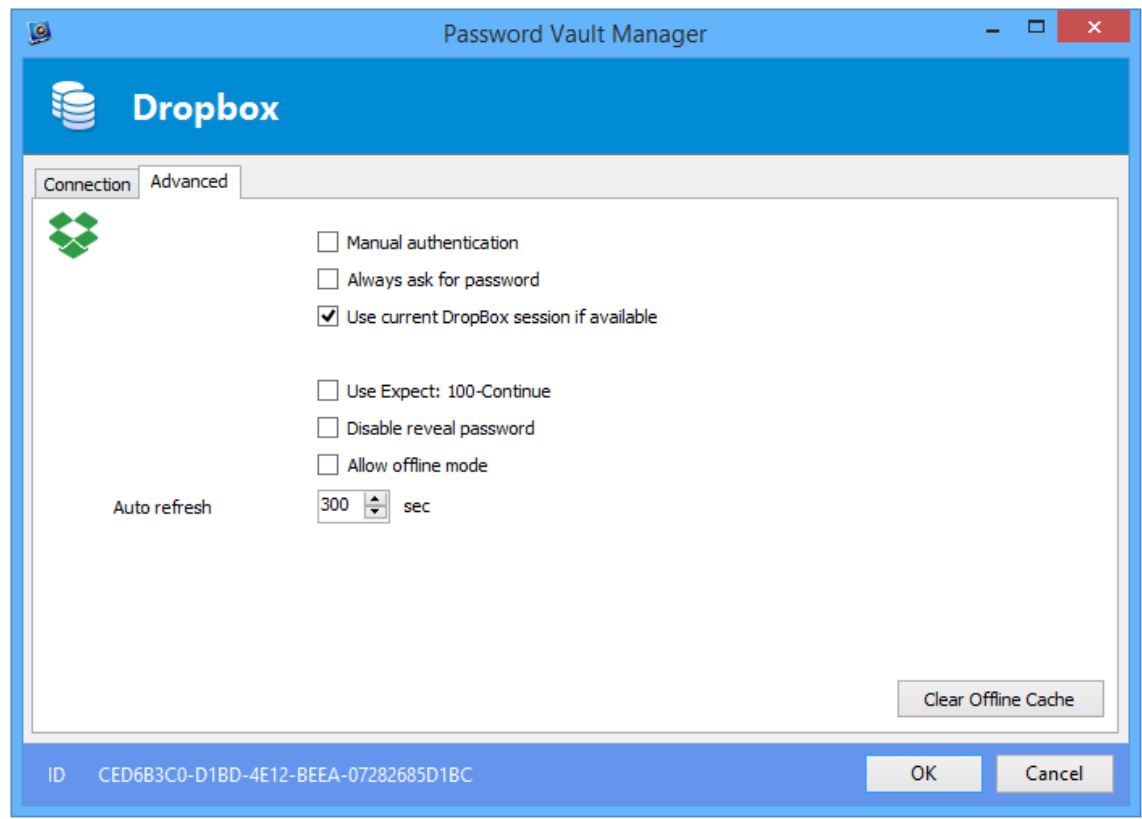


Password Vault Manager support the 2-Factor Authentication of Dropbox. When the button **Validate with Dropbox** is press and the 2-Factor Authentication is enable in Dropbox, a first box will open and ask for the Dropbox account password. After, a second box will open to enter the security code. The security code can be receive by SMS or generate by Google Authenticator.

Option	Description
Name	Name of the data source.

Email	Contains the email address associated with the Dropbox account.
Validate with Dropbox	Button to validate the email address with the Dropbox account.
Dropbox directory	Indicate the folder in Dropbox. It should not contains any drive since it's stored online. Leave it empty to use the default Dropbox root.
Filename	Indicate the filename used to store the data on the data source.
Compress database file	Activate this option if you wish to compress your database file.

### Advanced



### Dropbox Advanced tab

Option	Description
Manual authentication	Allow you to do a manual authentication.
Always ask for password	Always ask for password when connecting to the data source.
Use current Dropbox session if available	This option will use the Dropbox account who has been already validated without any other validation.
Use Expect: 100-Continue	Use the HTTP response status codes.
Disable reveal password	Disable the reveal password feature when a user access this data source.
Allow offline mode	Allow the data source to be used in <a href="#">Offline Mode</a> .
Auto refresh	Set the interval to use between each automatic refresh.

### 3.4.3 FTP

#### Description



Password Vault Manager downloads and uploads the session settings directly from file located on an FTP site.

#### Highlights

- This data source can be shared over the Internet between multiple locations
- This is a file-based data source, based on the XML data source



Although it can be shared between multiple locations, there is no conflict management for the configuration. If you share with other users you may get update conflicts and run into issues.

#### Settings

Consult [FTP settings](#) for more information on the configuration.

#### 3.4.3.1 Settings

##### Settings

##### Connection

Password Vault Manager

**Ftp**

Connection | Advanced | Security Settings | Proxy Settings | SSH Settings

Name

FTP path  Port

Username

Password

Filename

☒ Passive mode

The file will be created if it does not exist

ID 63831B29-906E-471F-BB02-57EDCAF89C8E

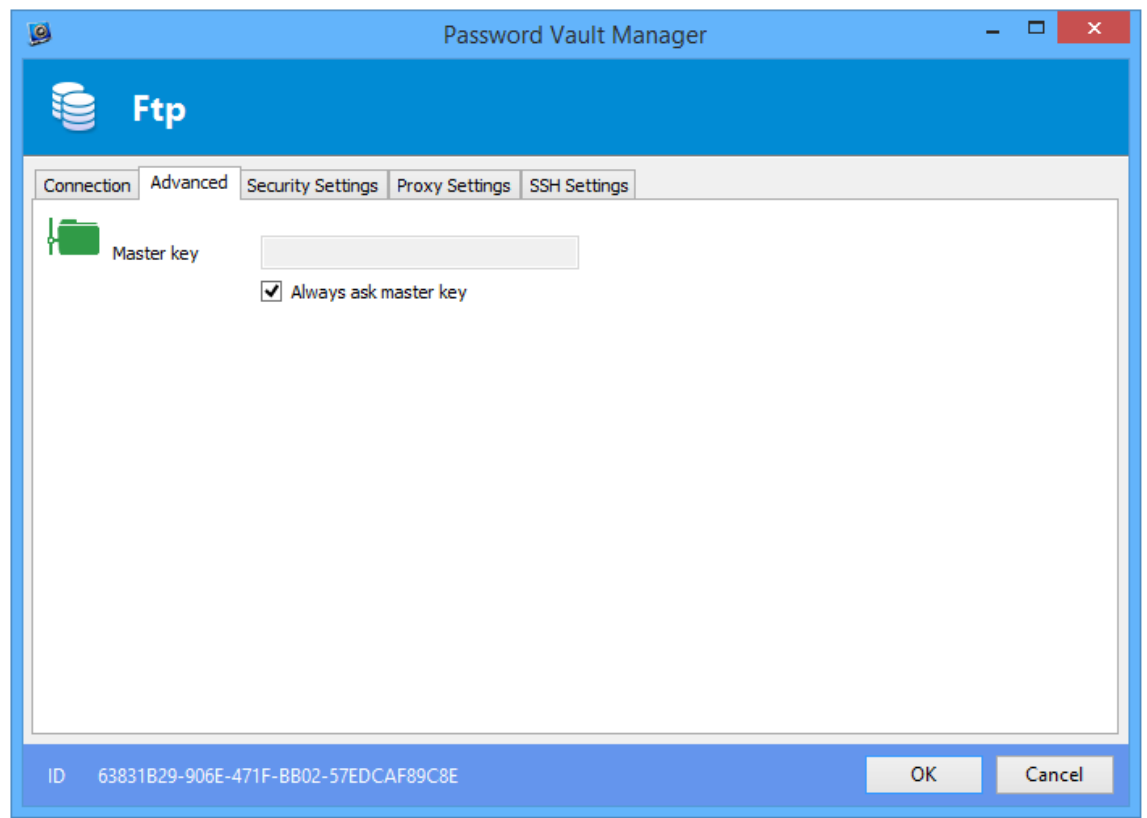
OK Cancel

**FTP Connection tab**

Option	Description
Name	Name of the data source.
FTP Path	FTP server name to access the XML file.
Passive mode	Set the FTP mode to passive.
Username	Username used to access the FTP server.
Password	Password used to access the FTP server.
Filename	Indicate the remote folder and filename for data source XML.

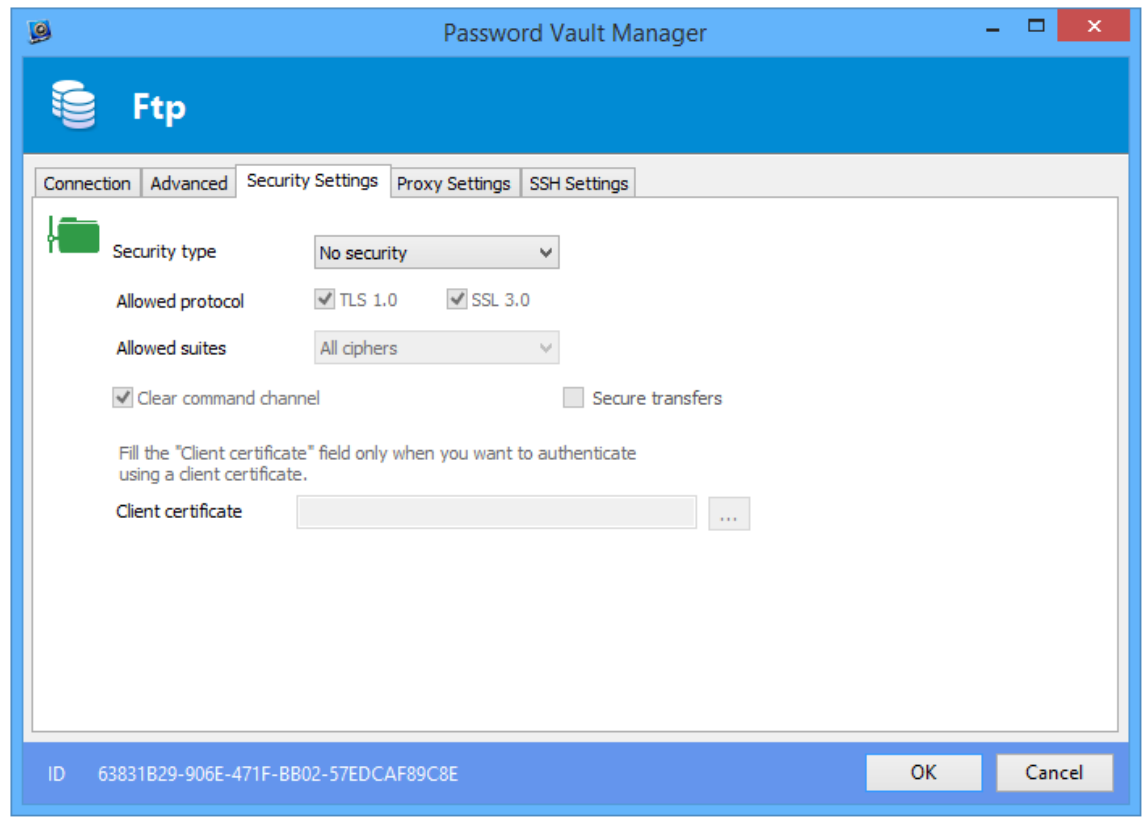
**Advanced**



**FTP Advanced tab**

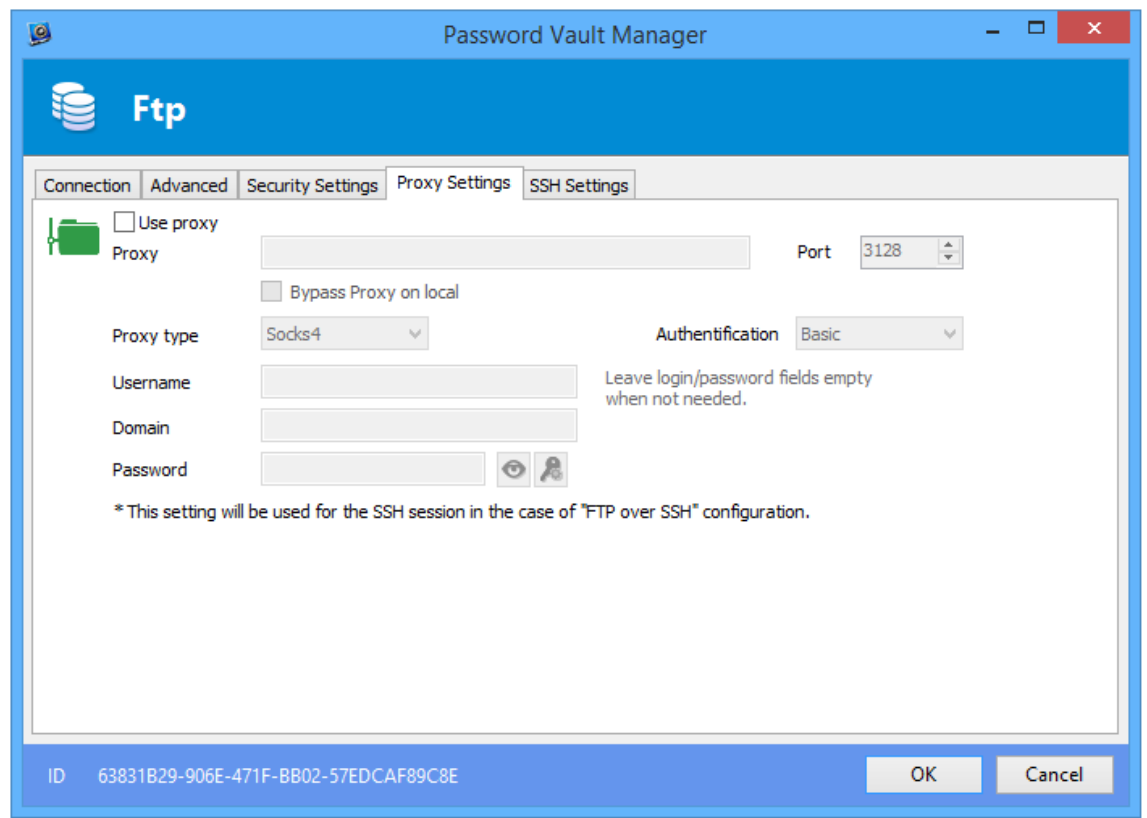
Option	Description
Always ask master key	Always ask the master key when connecting to the data source. The application will not store any password.

### ***Security Settings***

**FTP Security Settings tab**

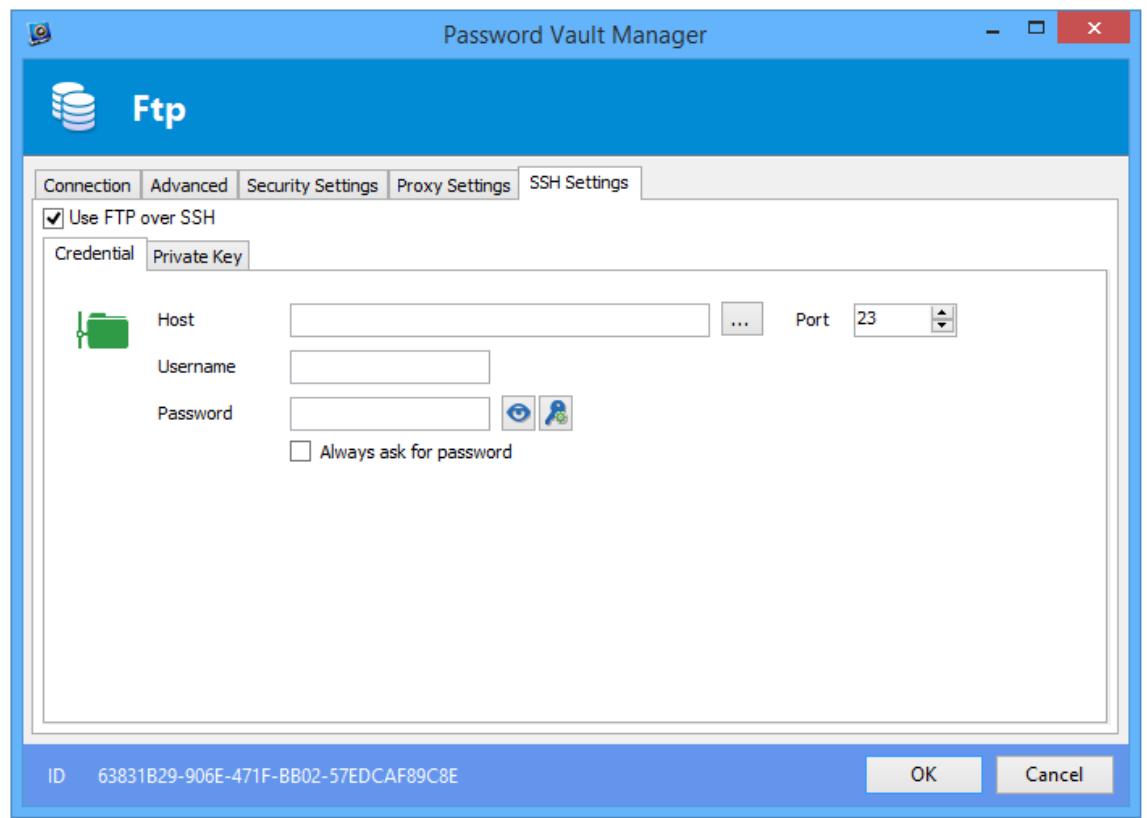
Option	Description
Security type	Specify the security type used for the FTP connection.
Allowed protocol	Indicate the allowed FTP protocol.
Allowed suites	Indicate the allowed cipher suites.
Clear command channel	If the Clear Control Connection (CCC) setting is enabled, the FTP client connects to the server, negotiates a secure connection, authenticates (sends user and password) and reverts back to plaintext.
Secure transfers	Enable the secure transfers.
Client certificate	Specify the client certificate used for the authentication.

### **Proxy Settings**

**FTP Proxy Settings tab**

Option	Description
Use proxy	Enable this option if you wish to use a proxy server.
Proxy	Enter the name of the Proxy Server.
Bypass Proxy on local	For local addresses, the proxy server will not be used.
Proxy type	Specify the proxy type to use.
Authentication	Select the type of authentication mode used to connect on the proxy server such as Basic or NTLM.
Username	Username to access the Proxy server.
Domain	Domain to access the Proxy server.
Password	Password to access the Proxy server.

### SSH Settings



FTP SSH Settings tab

Option	Description
Use FTP over SSH	Use FTP over SSH connection.
Host	Name of the host to access the FTP over SSH.
Username	Username to access the FTP Server over SSH.
Password	Password to access the FTP Server over SSH.
Always ask for password	Will always prompt you for your password.
No private Key	Indicate that no private key is used.
Private key file	Specify the private key filename located on the local disk.
Private key data	Specify the private key data instead of the filename.

### 3.4.4 Microsoft Access

#### Description



Password Vault Manager saves the settings in a Microsoft Access database, located on the local machine or on a network share.

Microsoft Access is a pseudo relational database management system from Microsoft, which combines the relational Microsoft Jet Database Engine with a graphical user interface and software development tools.

## Highlights

- This data source supports the native Access database password (Note that the password must be set using Microsoft Access directly --Password Vault Manager does not allow you to set or change the database, because it requires an exclusive connection to it)
- The [Offline Mode](#) is supported by this data source
- The database can be shared by multiple users on a network drive, but the performance and the data integrity can't be guaranteed
- The [Online Backup Service](#) is available for this data source



This data source is **not recommended** since Microsoft has stopped providing support in the newest Windows version.



Entering a database password when creating the physical file has no effect. You must use Microsoft Access to set the password in the database file.

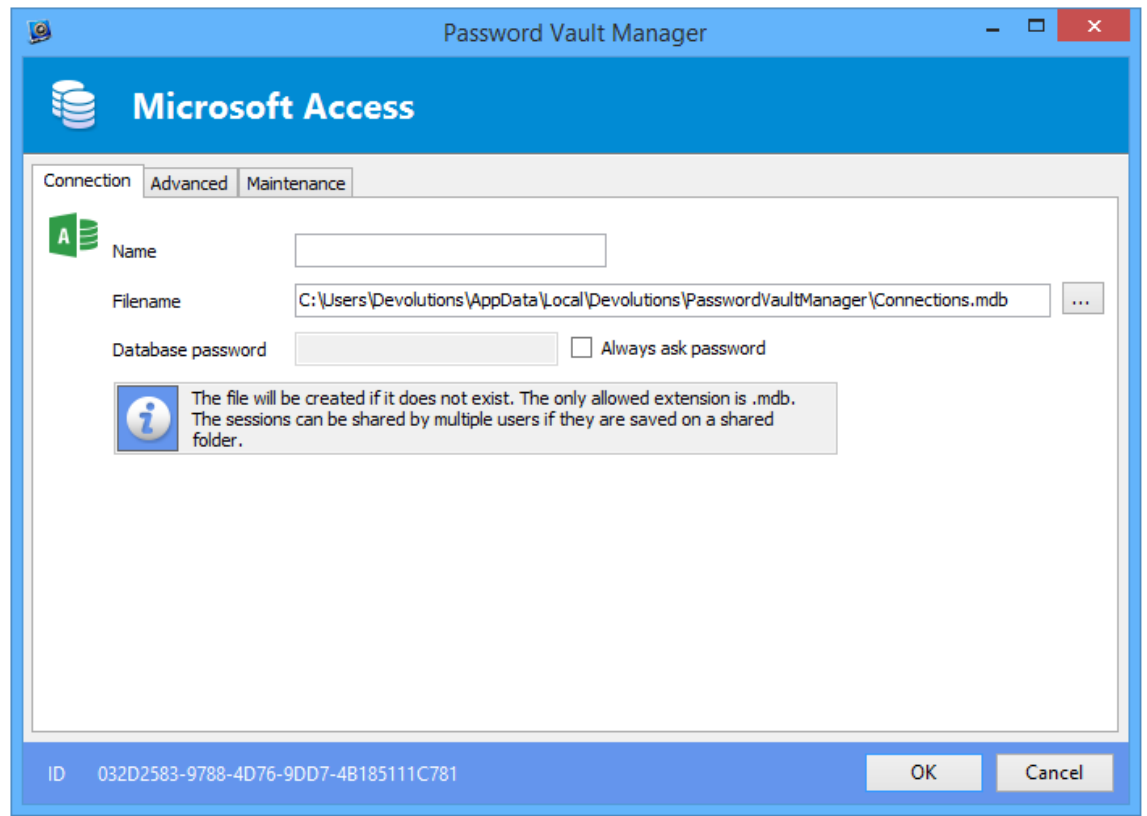
## Settings

Consult [Microsoft Access settings](#) topic for more information on the configuration.

### 3.4.4.1 Settings

## Settings

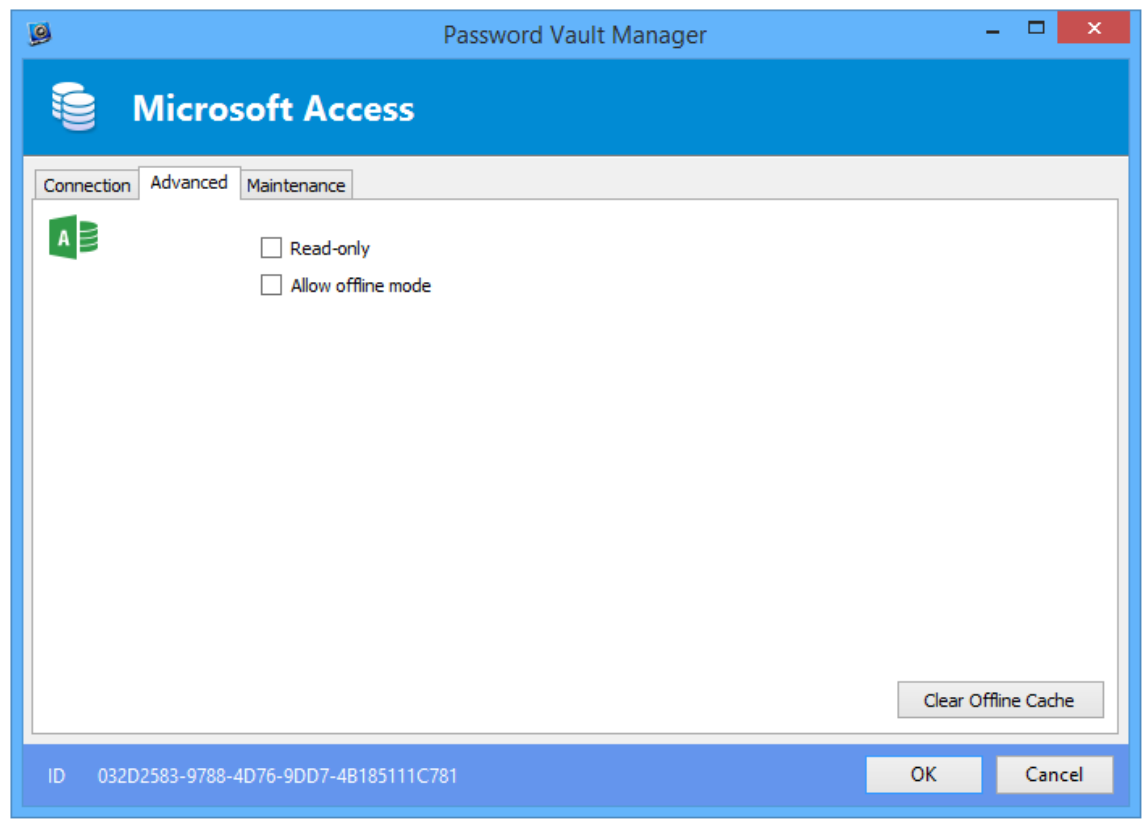
### *Connection*



#### MS Access Connection tab

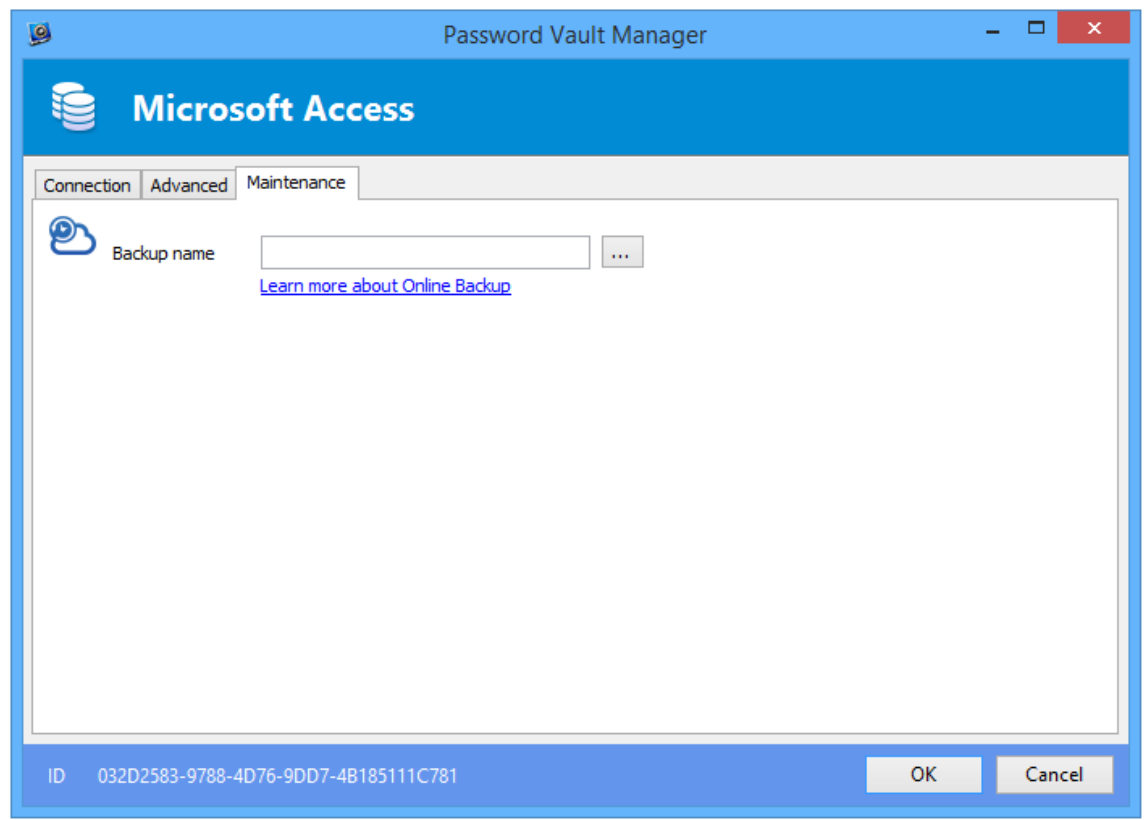
Option	Description
Name	Name of the data source.
Filename	Indicate the destination folder including data source file name. This needs to be an .mdb file extension.
Database password	Password to open the database. The application will not set the password. It needs to be applied with another tool like Microsoft Access directly.
Always ask password	Always ask for password when connecting to the data source.

#### *Advanced*

**MS Access Advanced tab**

Option	Description
Read-only	Set the data source in read only. No new entry can be created and the existing data cannot be edit.
Allow offline mode	Allow the data source to be use in <a href="#">Offline Mode</a> .

***Maintenance***



MS Access Maintenance tab

Option	Description
Backup name	Specify the backup name used by the <a href="#">Online Backup Service</a> (available via subscription). It allows you to automatically save your sessions in a safe online storage space, and restore them in the event of problems.

### 3.4.5 MariaDB

#### Description



Password Vault Manager uses MariaDB as a drop-in replacement for MySQL. It is only supported in the Enterprise edition.

#### Highlights

- The data can be shared on a MariaDB database installed on any Operating System MySQL supports
- Full connection log and attachments support
- Integrated Security support.

#### Settings

Consult [MariaDB settings](#) topic for more information on the configuration.



### 3.4.5.1 Settings

## Settings

### Connection

The screenshot shows the 'Password Vault Manager' window with the 'MariaDB' connection configuration tab selected. The 'Connection' tab contains the following fields and options:

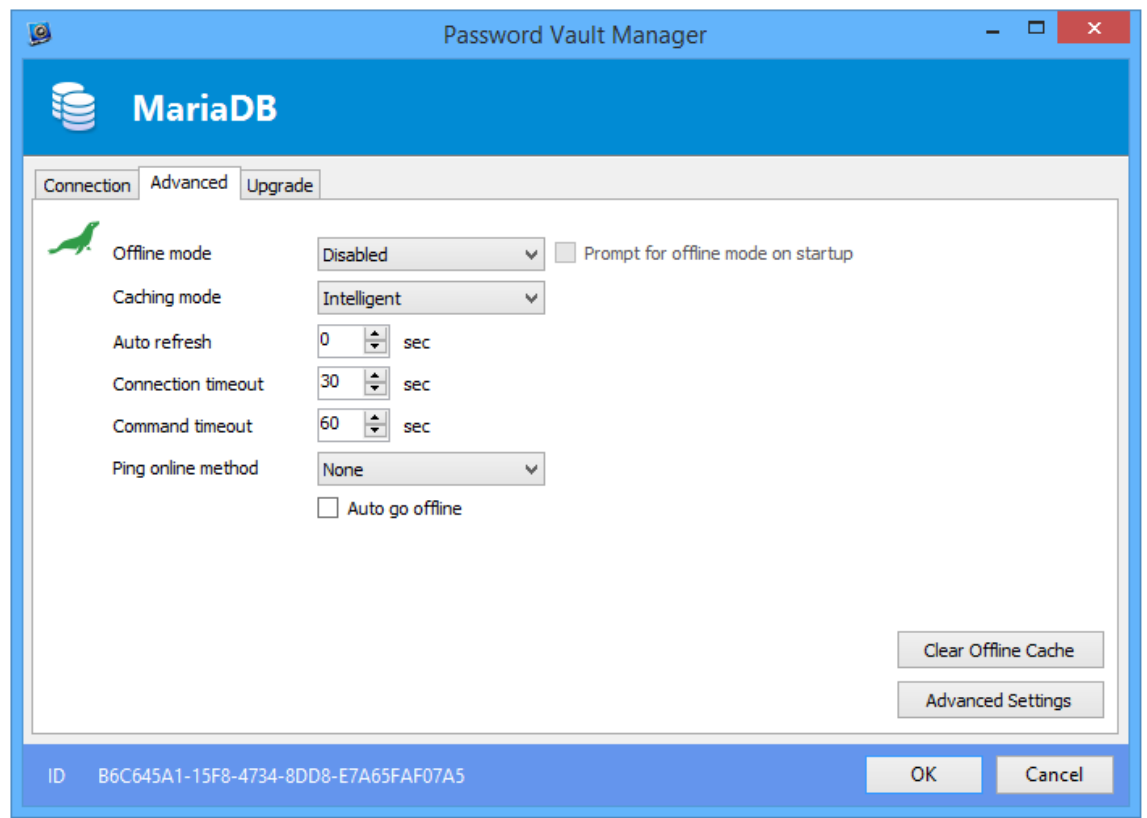
- Name:** A text input field.
- Host name:** A text input field.
- Port:** A spinner box set to 3306.
- User:** A text input field.
- Editable:** An unchecked checkbox.
- Save password:** A checked checkbox.
- Password:** A text input field.
- Schema:** A text input field with a dropdown arrow.

At the bottom right of the main area are two buttons: 'Test Host' and 'Test Schema'. The footer of the window displays the ID 'B6C645A1-15F8-4734-8DD8-E7A65FAF07A5' and 'OK' and 'Cancel' buttons.

**MariaDB Connection tab**

Option	Description
Name	Name of the data source.
Host name	Name of the host (server name) where the data source will be store.
User	Username used to access the host server.
Password	Password used to access the host server.
Schema	Name of the schema (database) on the MySQL server.
Test Host	Test the connection with the host (server name) to validate if the proper information has been provided.
Test Schema	Test the connection with the schema to validate if the proper information has been provided.

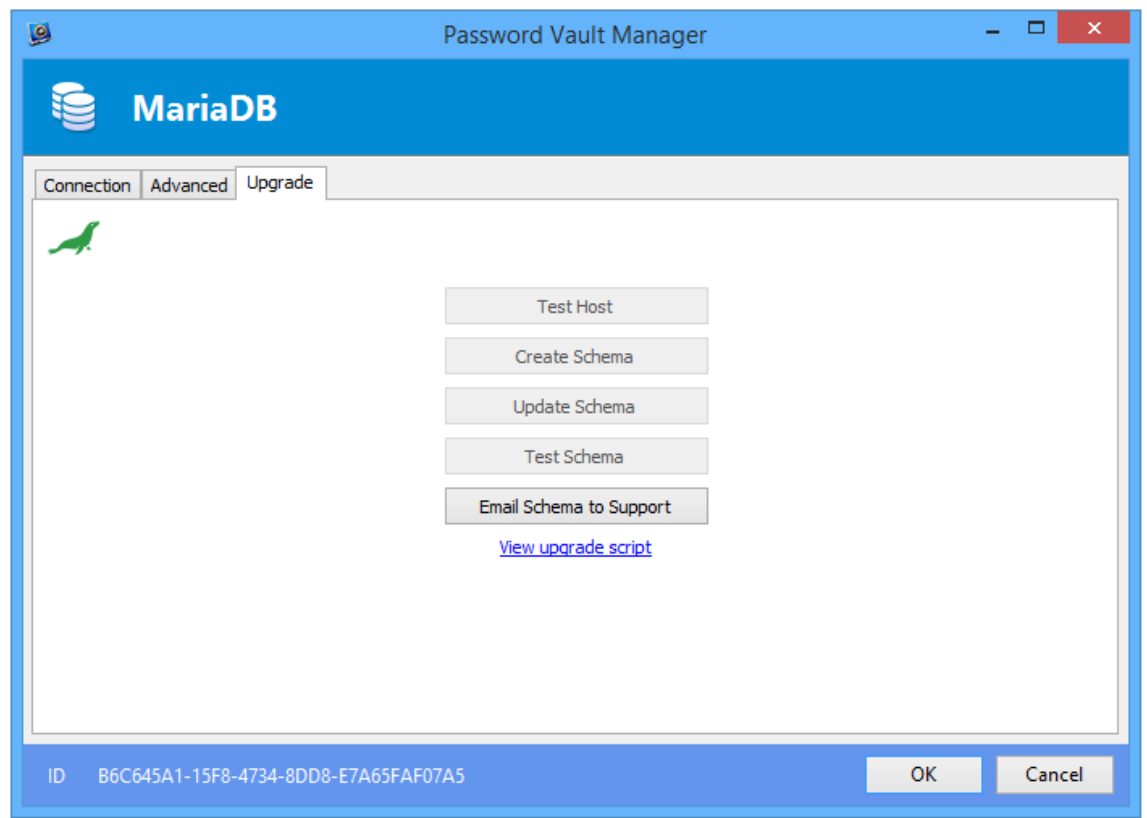
### Advanced



MariaDB Advanced tab

Option	Description
Offline mode	Determine if you want to use this data source in <a href="#">Offline Mode</a> . With this mode, the data source can be available in Read Only or in Read/Write mode.
Caching mode	Determine how the entries will be reloaded in the data source. See Caching Mode topic for more information.
Auto refresh	Set the interval for the automatic refresh
Connection timeout	Waiting time before a connection timeout.
Command timeout	Waiting time before a command timeout.
Ping online method	Indicate the prefer ping online. Select between: <ul style="list-style-type: none"> <li>• <b>None</b></li> <li>• <b>Port Scan</b></li> </ul>
Auto go offline	If the ping online method doesn't work it will automatically go offline.
Clear Offline Cache	Will clear the offline cache on your computer. This can be very helpful if you have offline issues.
Advanced Settings	Directly edit the connection string values.

### Upgrade

**MariaDB Upgrade tab**

Option	Description
Test Host	Test the connection with the Host (server name) to validate if the proper information has been provided.
Create Schema	Create the schema (database) on the MariaDB server to use Password Vault Manager.
Update Schema	Update the schema (database) on the MariaDB server, if required, to use Password Vault Manager.
Test Schema	Test the connection with the schema (database) to validate if the proper information has been provided.
Email Schema to Support	Send your schema (database) to the Devolutions Support team.

### 3.4.6 Online Drive

#### Description

Please consult topic [Online Drive](#) for information on this service.

#### Settings

Consult [Online Drive Settings](#) for more information on the configuration.

## 3.4.6.1 Setting

**Description****Connections**

Password Vault Manager

**Devolutions Online Drive**

Connection Advanced

Name Devolutions Online Drive

☒ Use default Remote Desktop Manager Online credentials

Email

Password Forgot password

[Create a free account](#)

Filename connections.dod ...

The file will be created if it does not exist

Test Connection

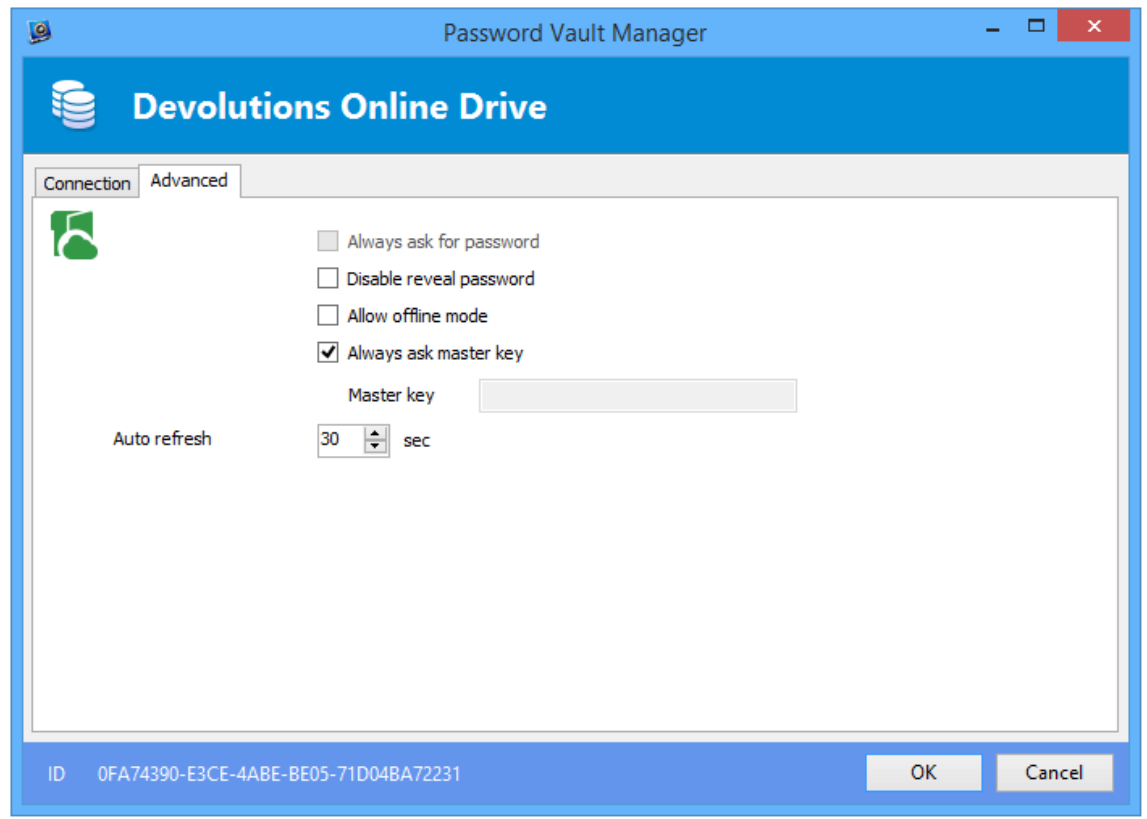
ID 0FA74390-E3CE-4ABE-BE05-71D04BA72231

OK Cancel

**DOD connection tab**

Option	Description
Name	Name of the data source.
Use default Remote Desktop Manager Online credentials	Use the credentials from your Devolutions Cloud account. You need to be connected with this account in <b>File - Online Account</b> .
Email	Contains the email address associated with the Devolutions Cloud account.
Password	Password used to access the Devolutions Cloud account.
Create a free account	Create a new Devolutions Cloud Online account.
Filename	Indicate the filename used to store the data on the data source.
Test Connection	Test the connection with Devolutions Online Drive to validate if the proper information has been provided.

**Advanced**



DOD advanced tab

Option	Description
Always ask for password	Always ask for password when connecting to the data source.
Disable reveal password	Disable the reveal password feature when a user access this data source.
Allow offline mode	Allow the data source to be used in <a href="#">Offline Mode</a> .
Always ask master key	Always ask for master key when connecting to the data source.
Auto refresh	Set the interval to use between each automatic refresh.

### 3.4.7 SFTP

#### Description



Password Vault Manager downloads and uploads the session settings directly from a XML file located on an Secure FTP.

#### Highlights

- This data source can be shared over the Internet between multiple users

- This is a file-based data source, based on the XML data source



Although it can be shared between multiple locations, there is no conflict management for the configuration. If you share with other users you may get update conflicts and run into issues. This data source type is meant for a single user using multiple computers, not multiple users.

## Settings

Consult [SFTP settings](#) for more information on the configuration.

### 3.4.7.1 Settings

## Settings

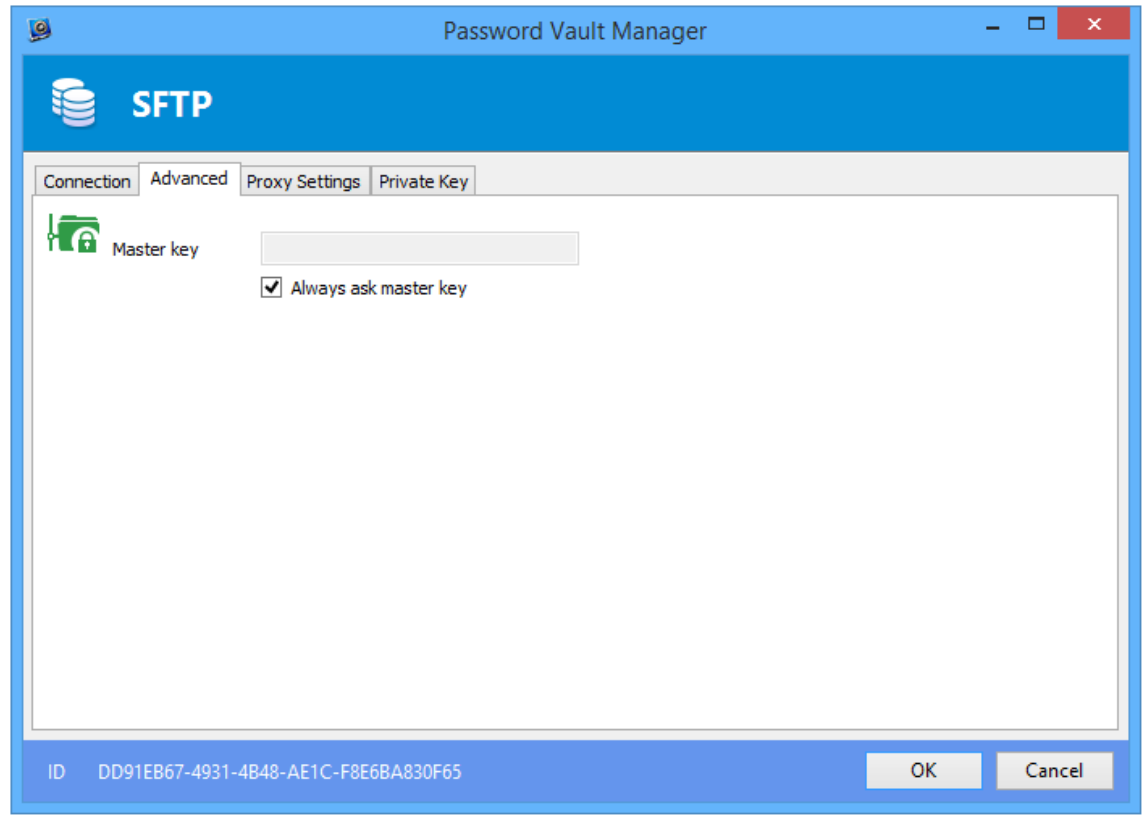
### Connection

#### SFTP Connection tab

Option	Description
Name	Name of the data source.
FTP Host	FTP server name to access the XML file.
Username	Username used to access the FTP server.
Password	Password used to access the FTP server.

Filename      Indicate the remote folder and filename for data source XML.

### Advanced



SFTP Advanced tab

Option	Description
Always ask master key	Always ask the Master key when connecting to the data source.

### Proxy Settings

Password Vault Manager

**SFTP**

Connection Advanced **Proxy Settings** Private Key

☒ Use proxy

Proxy  Port

☐ Bypass Proxy on local

Proxy type  Authentication

Username

Domain

Password

Leave login/password fields empty when not needed.

ID DD91EB67-4931-4B48-AE1C-F8E6BA830F65

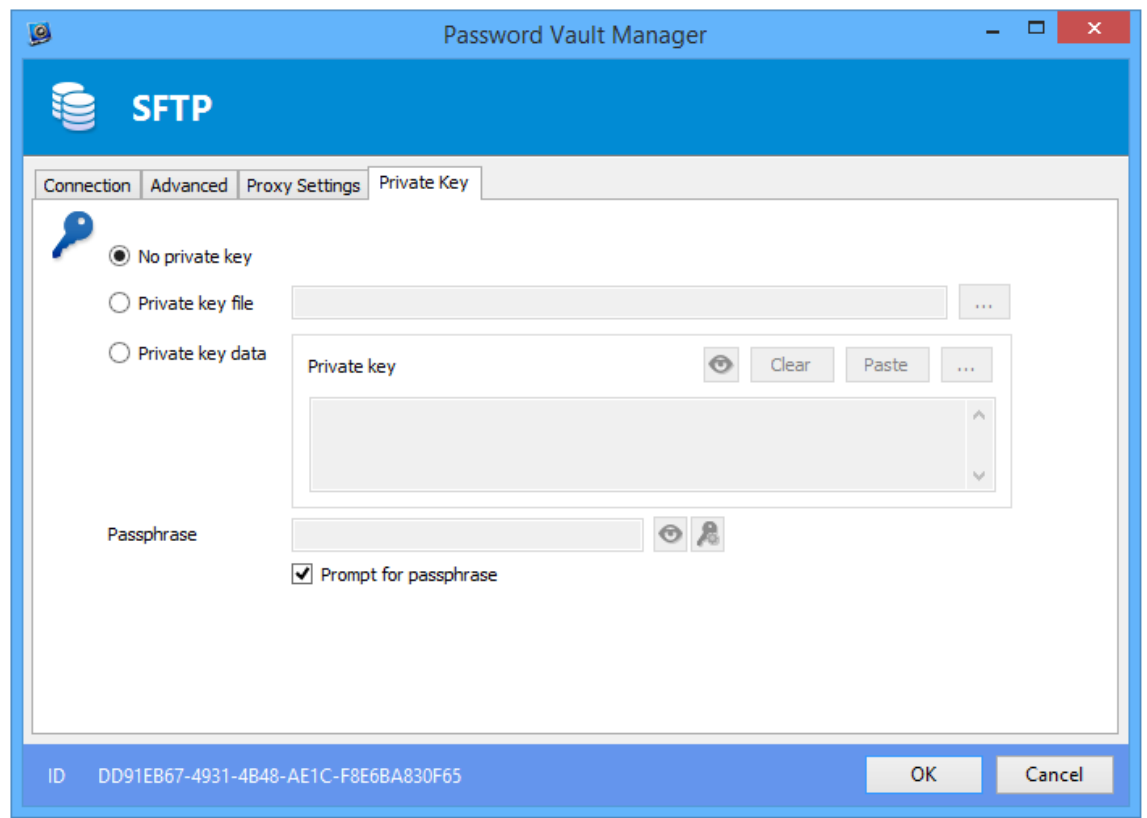
OK Cancel

SFTP Proxy Settings tab

Option	Description
Proxy	Enter the name of the Proxy Server.
Bypass Proxy on local	For local addresses, the proxy server will not be used.
Proxy type	Specify the proxy type to use. Select between: <ul style="list-style-type: none"> <li>• <b>Socks4</b></li> <li>• <b>Socks4a</b></li> <li>• <b>Socks5</b></li> <li>• <b>HttpConnect</b></li> <li>• <b>FtpSite</b></li> <li>• <b>FtpUser</b></li> <li>• <b>FtpOpen</b></li> </ul>
Authentication	Select the type of authentication mode used to connect on the proxy server. Select between: <ul style="list-style-type: none"> <li>• <b>Basic</b></li> <li>• <b>NTLM</b></li> </ul>
Username	Username to access the Proxy server.
Domain	Domain to access the Proxy server.
Password	Password to access the Proxy server.

**Private Key**



**SFTP Private Key tab**

Option	Description
No private Key	Indicate that no private key is used.
Private key file	Specify the private key filename located on the local disk.
Private key data	Specify the private key data instead of the filename.
Passphrase	Enter the passphrase to connect.
Prompt for passphrase	Always ask for the passphrase.

### 3.4.8 SQLite

#### Description



Password Vault Manager SQLite data source is ideal for single user stand alone situations. More powerful and more flexible than the XML file format, it also supports a few of the advanced data source options like Logs and Attachments.

#### Highlights

- Full connection log and attachments support
- The [Online Backup Service](#) is available for this data source



All passwords are encrypted by default by Password Vault Manager. You can specify a custom password to fully encrypt the content of the SQLite database.

SQLite password recovery is not possible, the data will be unrecoverable if you cannot authenticate. Please ensure you backup the password in a safe place.

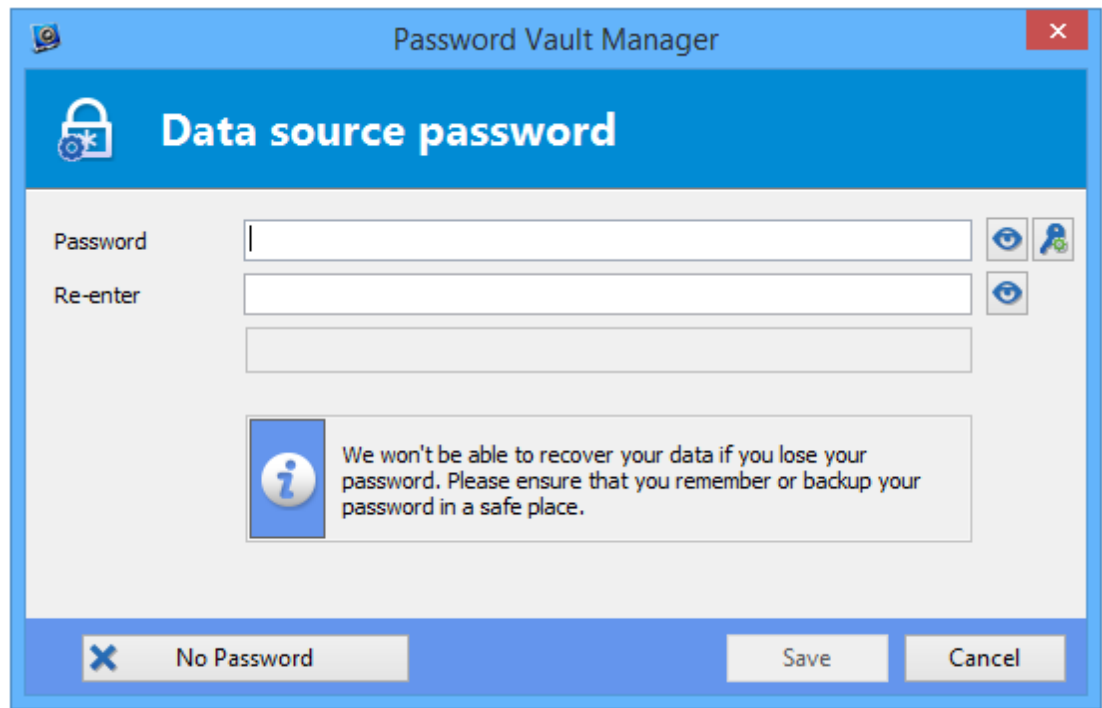
## Settings

Consult [SQLite settings](#) topic for more information on the configuration.

### *Password management*

You can specify a password to further encrypt your data. Specify it at creation time. If the data source already exists you can modify the password by using the **File - Manage Password** dialog.

Change or clear the password of a SQLite data source.

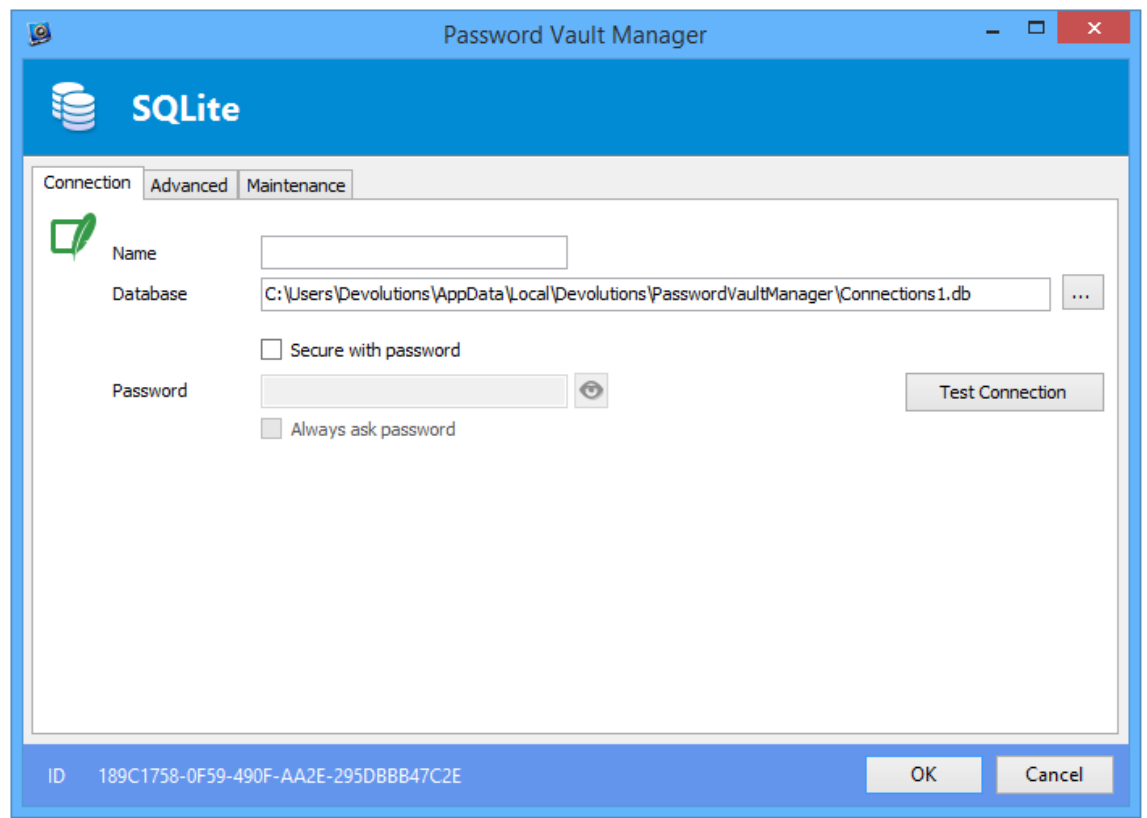


Manage password dialog

### 3.4.8.1 Settings

## Settings

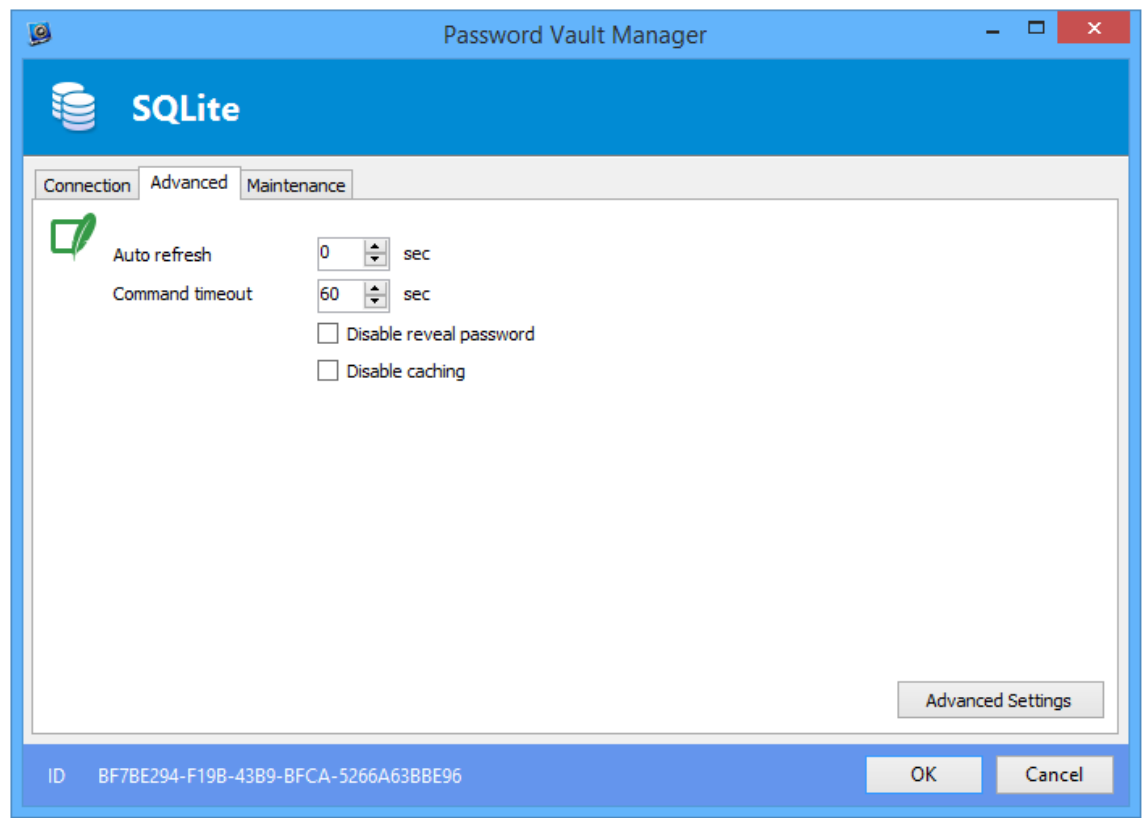
### *Connection*

**SQLite Connection tab**

Password recovery is not possible, the data will be unrecoverable if you cannot authenticate. Please ensure you backup the password in a safe place.

Option	Description
Name	Name of the data source.
Database	Indicates the filename of the SQLite database (.db).
Secure with password	Secure the data source with a password. This is used to encrypt the database content and it cannot be recovered if lost.
Password	Password used to access the data source.
Always ask password	Always ask for the password when connecting to the data source.
Test Connection	Test your data source connection.

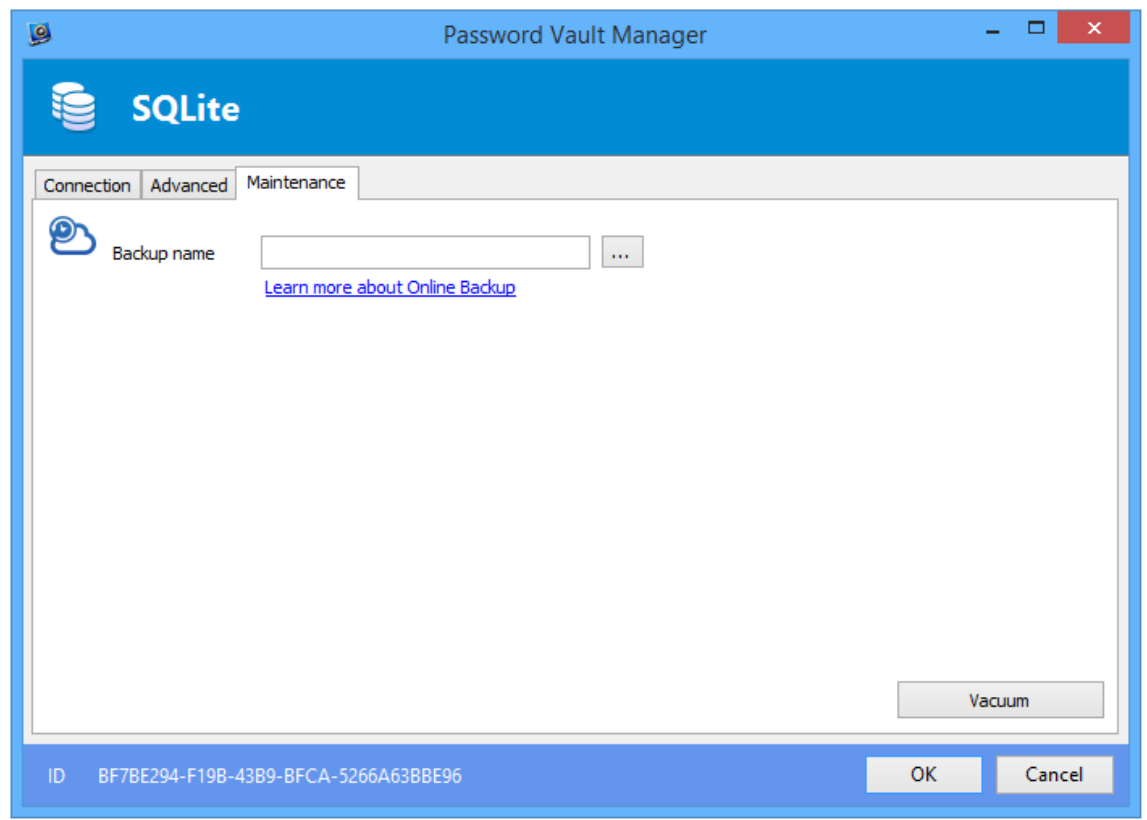
### **Advanced**



SQLite Advanced tab

Option	Description
Auto refresh	Set the interval for the automatic refresh.
Command timeout	Waiting time before a command timeout.
Disable reveal password	Disable the reveal password feature when a user access this data source.
Disable caching	Entries will be reloaded in Simple mode in the data source. See Caching Mode topic for more information.
Advanced Settings	Use to directly modify the connection string value.

### **Maintenance**



SQLite Maintenance tab

Option	Description
Backup name	Specify the backup name used by the <a href="#">Online Backup Service</a> (available via subscription). It allows you to automatically save your sessions in a safe online storage space, and restore them in the event of problems.
Vacuum	Used to compress and clean up the current database file.

### 3.4.9 Web

#### Description



Password Vault Manager reads the session settings directly from a file located on a web site.

#### Highlights

- This read-only data source can be shared over the Internet between multiple users
- This is a file-based data source, based on the XML data source
- Supports Windows authentication in IIS

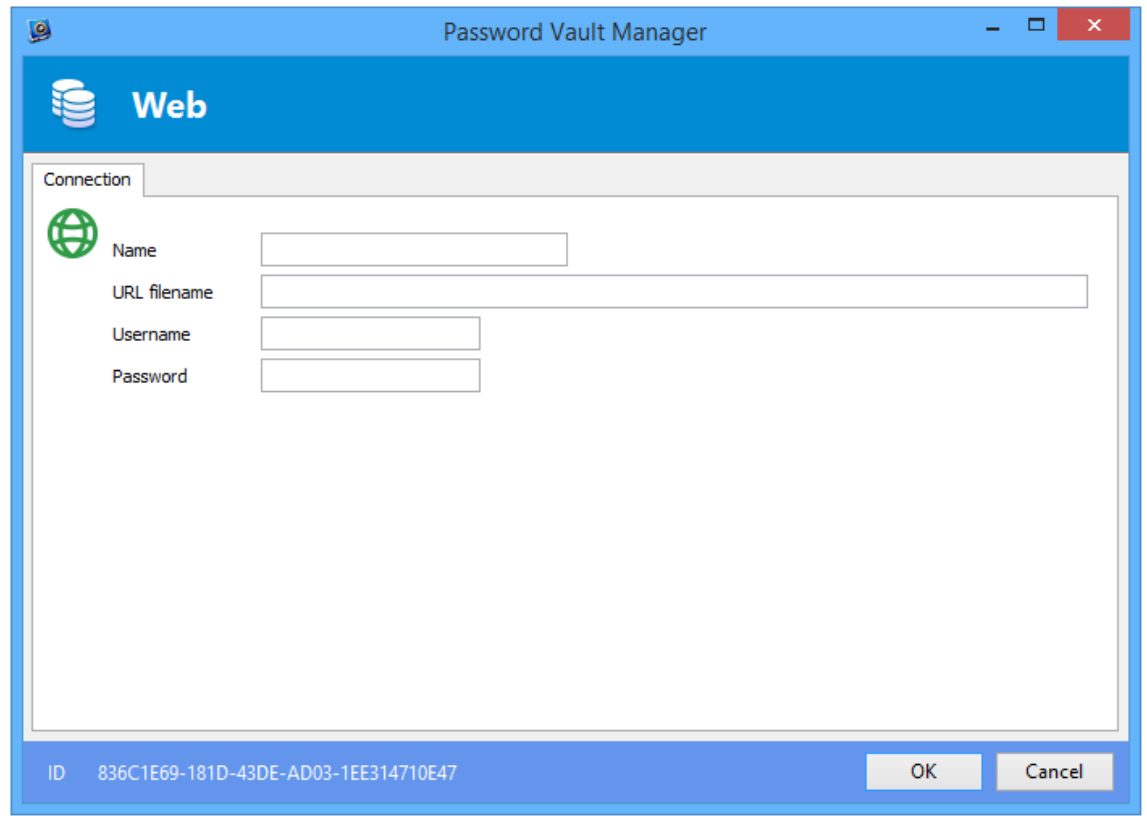
#### Settings

Consult [Web settings](#) for more information on the configuration.

### 3.4.9.1 Settings

## Settings

### Connection



The screenshot shows the 'Web' tab of the 'Password Vault Manager' dialog box. The 'Connection' section is active, featuring a globe icon and four input fields: 'Name', 'URL filename', 'Username', and 'Password'. The 'Name' field is empty, while the others are also empty. The 'URL filename' field is a single-line text box. The 'Username' and 'Password' fields are single-line text boxes. At the bottom, there is an 'ID' field with the value '836C1E69-181D-43DE-AD03-1EE314710E47' and two buttons: 'OK' and 'Cancel'.

#### Web Connection tab

Option	Description
Name	Name of the data source.
URL filename	Indicate the web location of the data source and the name of data source file.
Username	Username used to access the data source.
Password	Password used to access the data source.

### 3.4.10 XML

## Description



Password Vault Manager saves the settings directly in a file with the XML format.

## Highlights

- This is a very simple data source and it can be modified or generated by an external tool
- It's possible to configure auto refresh and share the file on a network share
- There is no locking mechanism – therefore only one user at the time should modify the list
- This is a good replacement for the Access data source, or for users who have problems with their MDAC driver (Microsoft Access database connector)
- The [Online Backup](#) service is available for this data source



All passwords are encrypted by default. You can specify a custom password (master key) to fully encrypt the content of the file.  
It's impossible to recover the data if the master key is lost. Please make sure to remember or backup the master key in a safe place.

Consult [XML Settings](#) for more information on the configuration.

### 3.4.10.1 Settings

## Settings

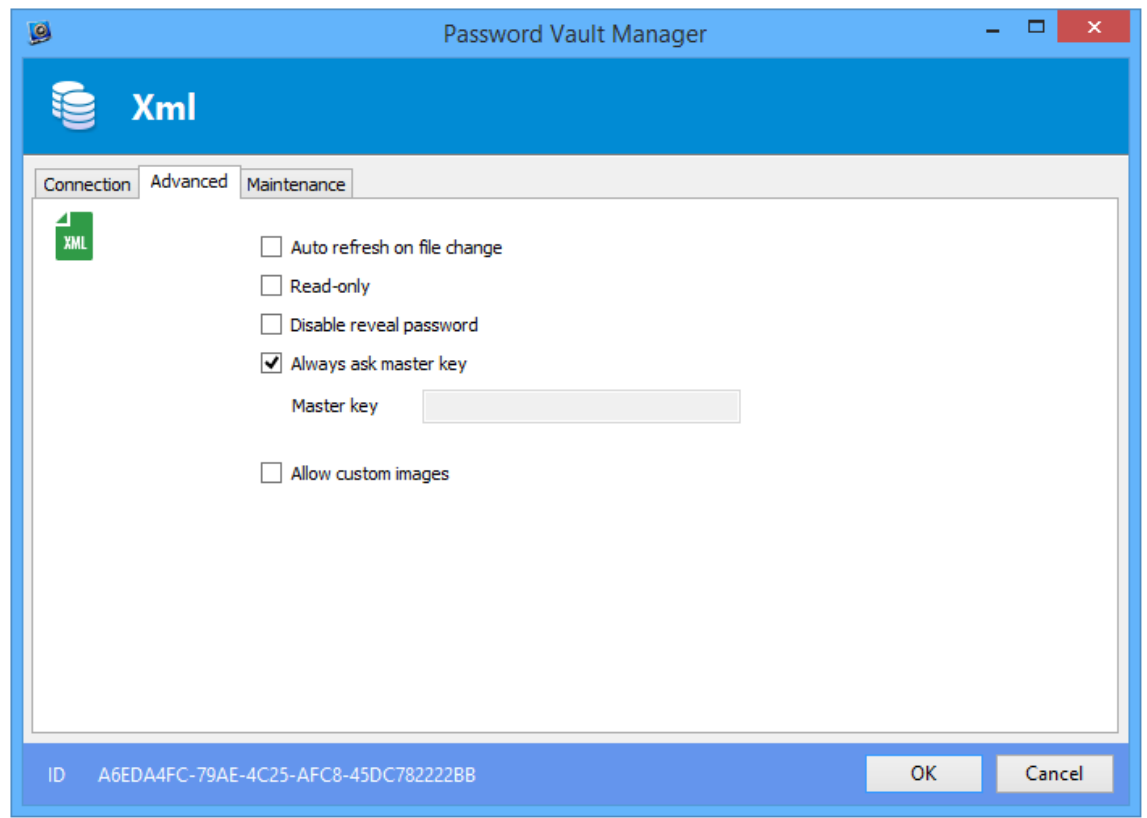
### Connection

**XML Connection tab**

Option	Description
Name	Name of the data source.

Filename	Specify the full path of the XML file used to save the data. Relative paths and environment variables can be used as well.
----------	--

### Advanced

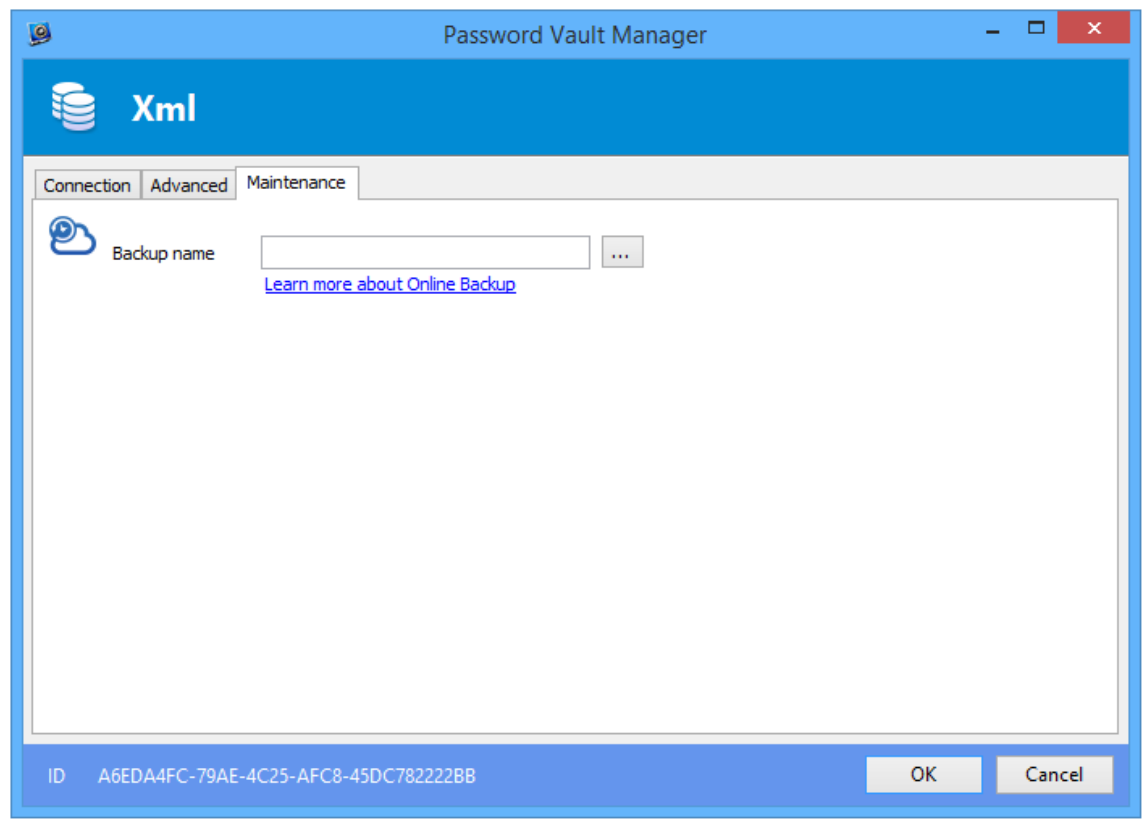


### XML Advanced tab

Option	Description
Auto refresh on file change	Indicate if the application monitor the file changes to automatically refresh the data source.
Read-only	Set the data source in read only. No new entry can be created and the existing data cannot be edit.
Disable reveal password	Disable the reveal password feature when a user accesses this data source.
Always ask master key	Always ask the Master key before opening the data source. This is used to encrypt the XML content and it could not be recovered if lost.
Master key	Enter your Master key that will be used before opening the data source.
Allow custom images	This will enable the loading of any custom images in the tree view.

### Maintenance



**XML Maintenance tab**

Option	Description
Backup name	Specify the backup name used by the <a href="#">Online Backup Service</a> (available via subscription). It allows you to automatically save your sessions in a safe online storage space, and restore them in the event of problems.

### 3.4.11 Advanced Data Sources

#### Description

We call advanced data source those which support these features:

- Attachments
- Audit and logs
- Advanced security with user and security group management

For now it's supported by those data sources:

- [Microsoft SQL Server](#)
- [SQL Azure](#)
- [MySQL](#)
- [Online Database](#)
- [Devolution Server](#)

### 3.4.11.1 SQL Server (MSSQL)

#### Description



Password Vault Manager uses the power of Microsoft SQL Server to save and manage all sessions.

Microsoft SQL Server 2005, 2008, 2008R2, 2012 and 2014 are supported (All editions except the compact).

We also support the following features:

- ***Always on availability group***
- ***Clustering***
- ***Log Shipping***
- ***Database mirroring***

See this [Configure SQL Server](#) topic for more details about how to configure SQL Server.

#### Highlights

- This data source allows user management with a superior security model
- The [Offline Mode](#) can be used when the server is unavailable, or when the user is on the road
- Full connection log and attachment support
- The data source supports an auto refresh at your preferred interval



A proper database backup strategy should be implemented to minimize possible data loss, please refer to [Backups](#) topic.



To configure a SQL Server data source, please read the [Configure SQL Server](#) topic.

#### Settings

Consult [SQL Server settings](#) topic for more information on the configuration.

#### 3.4.11.1.1 Settings

#### Settings

#### Connection

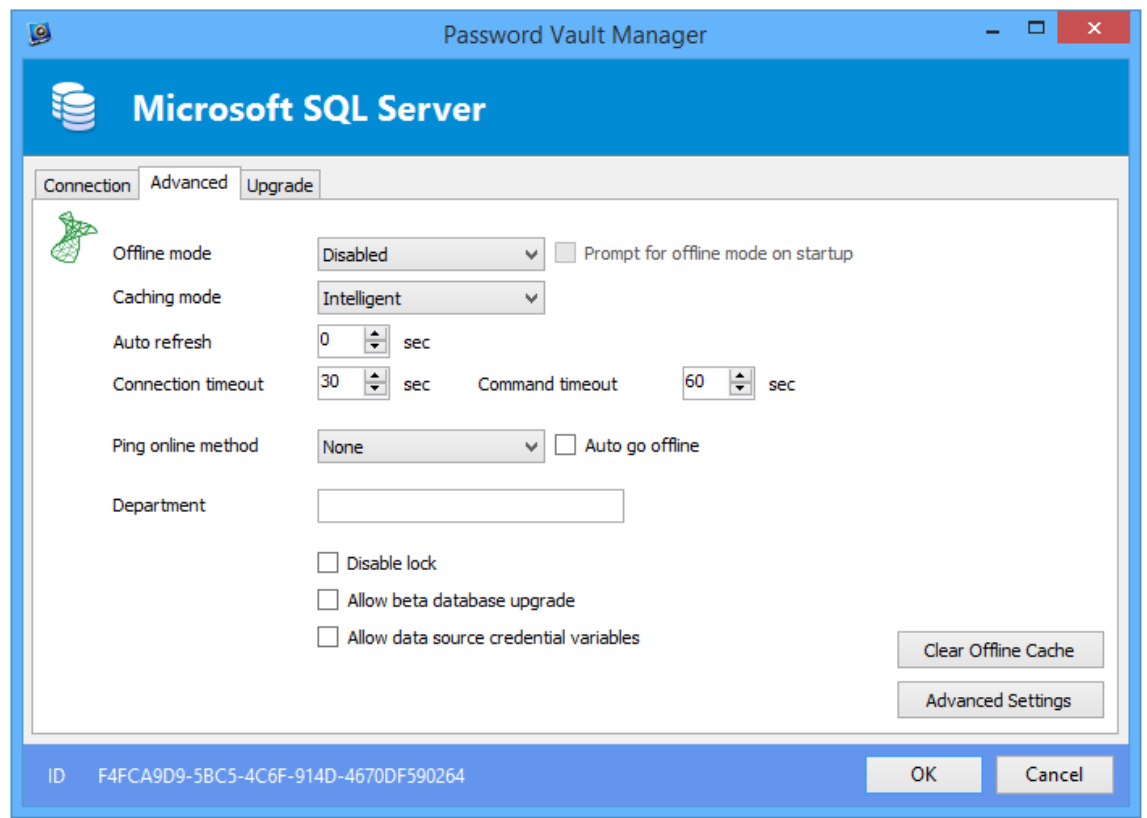
The screenshot shows the 'Password Vault Manager' window for 'Microsoft SQL Server'. It features a 'Connection' tab with the following fields and options:

- Name:** A text input field.
- Server:** A dropdown menu currently set to 'SQL Server', with a button to browse for '(Local) or IP or Server name'.
- Integrated security (Active Directory):** An unchecked checkbox.
- User:** A text input field with an 'Editable' checkbox.
- Save password:** A checked checkbox.
- Password:** A text input field.
- Database:** A text input field with a browse button.
- Test Server:** A button to test the server connection.
- Test Database:** A button to test the database connection.
- OK / Cancel:** Standard dialog buttons.
- ID:** 364B0583-1BC6-4996-9A3B-D944BC2219C4

#### SQL Connection tab

Option	Description
Name	Name of the data source.
Server	Name of the server where the data source will be store.
Integrated security (Active Directory)	Specify to use Windows Integrated Authentication for authenticating to the data source. Applies only to SQL Server and RDMS, depending on their configuration. When checked, an ellipsis button appears to allow you to browse for the user account in the directory. Consult <a href="#">Integrated Security</a> topic for more information.
User	Username to access the SQL server.
Password	Password used to access the SQL server.
Database	Name of the database on the SQL server for the utilization of Password Vault Manager.
Test Server	Test the connection with the server to validate if the proper information has been provided.
Test Database	Test the connection with the database to validate if the proper information has been provided.

#### Advanced

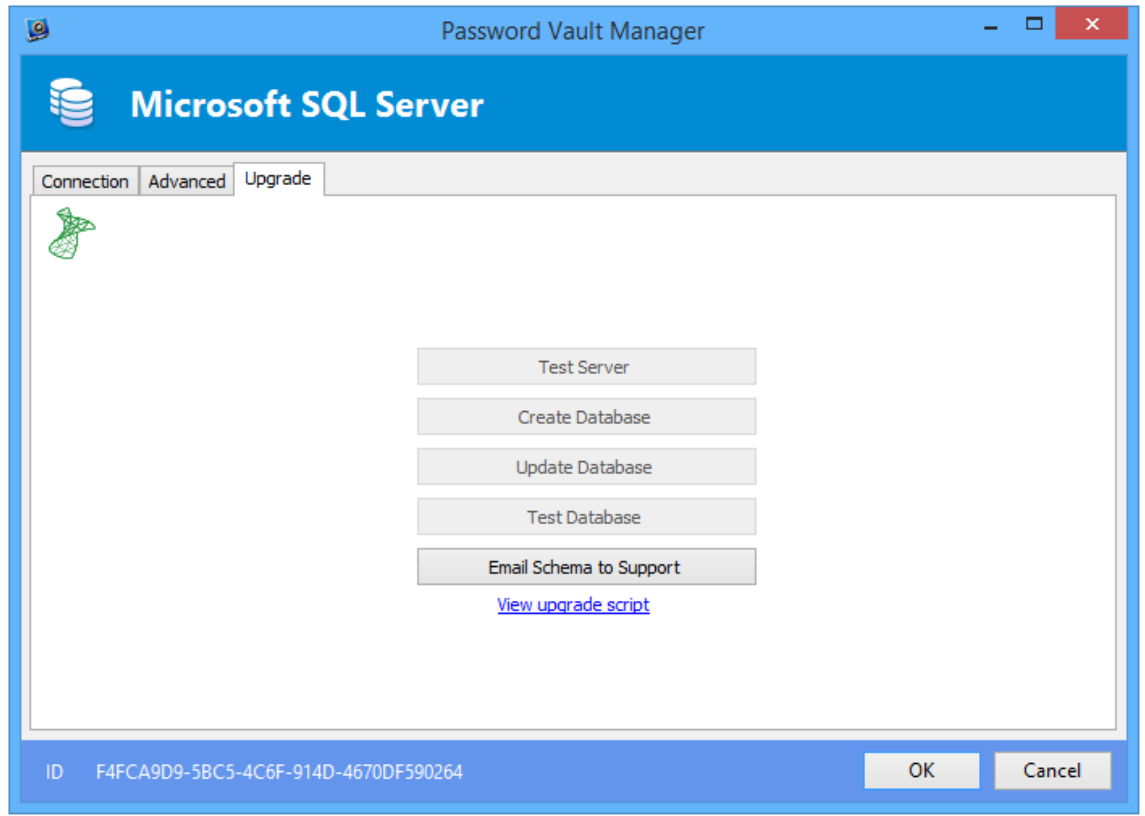


SQL Advanced tab

Option	Description
Offline mode	Determine if you want to use this data source in <a href="#">Offline Mode</a> . With this mode, the data source can be available in Read Only or in Read/Write mode
Caching mode	Determine how the entries will be reload in the data source.
Auto refresh	Set the interval for the automatic refresh
Connection timeout	Waiting time before a connection timeout.
Command timeout	Waiting time before a command timeout.
Ping online method	Indicate the prefer ping online method. Select between: <ul style="list-style-type: none"> <li>• <b>None</b></li> <li>• <b>Ping</b></li> <li>• <b>Port Scan</b></li> </ul>
Auto go offline	If the ping online method doesn't work it will automatically go offline.
Department	Departments are folder paths that will allow you to have a single database with multiple data sources.
Disable lock	Disable the option to lock the data source directly. You can still lock the application but you won't be prompted for the database password if this option is disabled.
Allow beta database upgrade	If an upgrade is required and you are using a beta version and database, it will authorize you to upgrade it.
Clear Offline Cache	Will clear the offline cache on your computer. This can be very helpful if you have offline issues.

Advanced Settings Edit of the connection string values directly.

### Upgrade



SQL Upgrade tab

Option	Description
Test Server	Test the connection with the server to validate if the proper information has been provided.
Create Database	Create the database on the SQL server to use Password Vault Manager.
Update Database	Update the database on the SQL server, if required to use Password Vault Manager.
Test Database	Test the connection with the database to validate if the proper information has been provided.
Email Schema to Support	Send your schema to the Devolutions Support team.

#### 3.4.11.2 MySQL

### Description



Password Vault Manager uses a MySQL database to store the session data. It is only supported in the Enterprise edition.

## Highlights

- The data can be shared on a MySQL database installed on any Operating System MySQL supports.
- Full connection log and attachment support.
- Integrated Security support. (Requires a v5.5.16 commercial distribution of MySQL).

## Settings

Consult [MySQL settings](#) for more information on the configuration.

### 3.4.11.2.1 Settings

## Settings

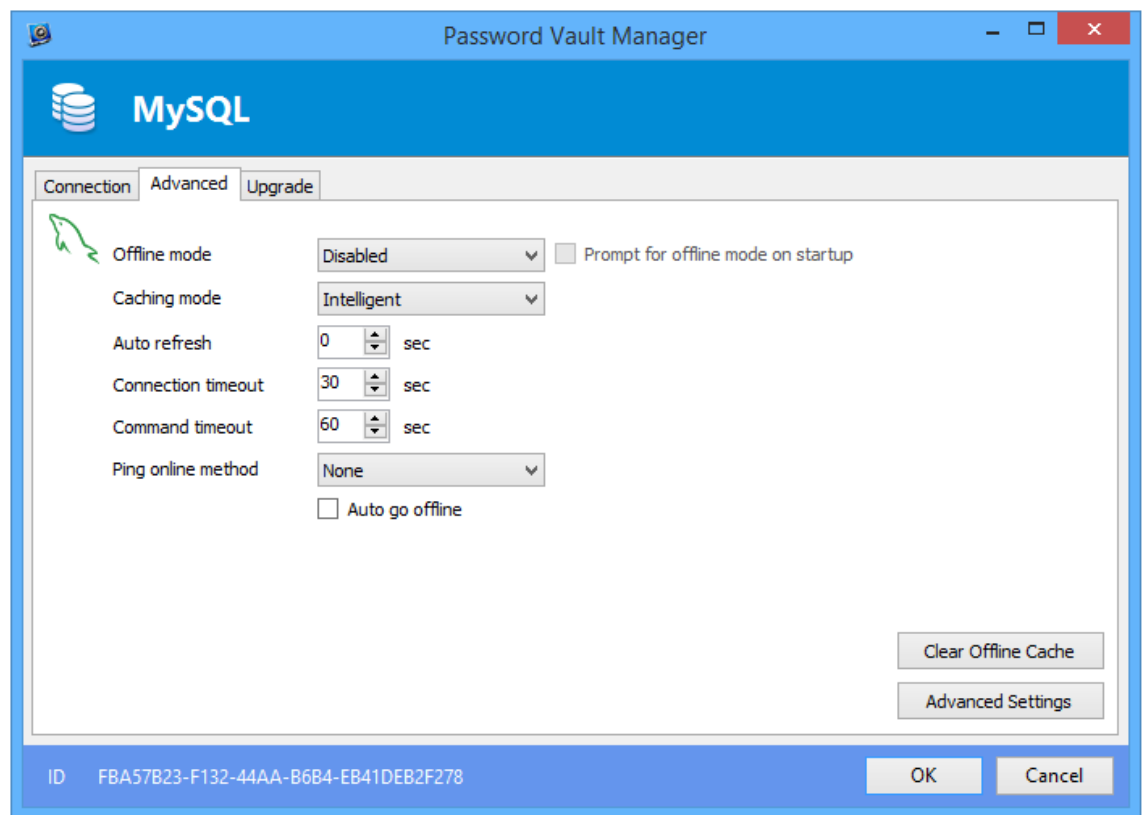
### Connection

#### MySQL Connection tab

Option	Description
Name	Name of the data source.
Host name	Name of the server where the data source will be store.
Integrated	Specify to use Windows Integrated Authentication for authenticating to the data

security (Active Directory)	source. Applies only to SQL Server and RDMS, depending on their configuration. When checked, an ellipsis button appears to allow you to browse for the user account in the directory. Consult <a href="#">Integrated Security</a> topic for more information.
User	Username to access the MySQL server.
Password	Password to access the MySQL server.
Schema	Name of the schema on the MySQL server for the utilization of Password Vault Manager.
Test Host	Test the connection with the Host (server) to validate if the proper information has been provided.
Test Schema	Test the connection with the schema to validate if the proper information has been provided

### Advanced

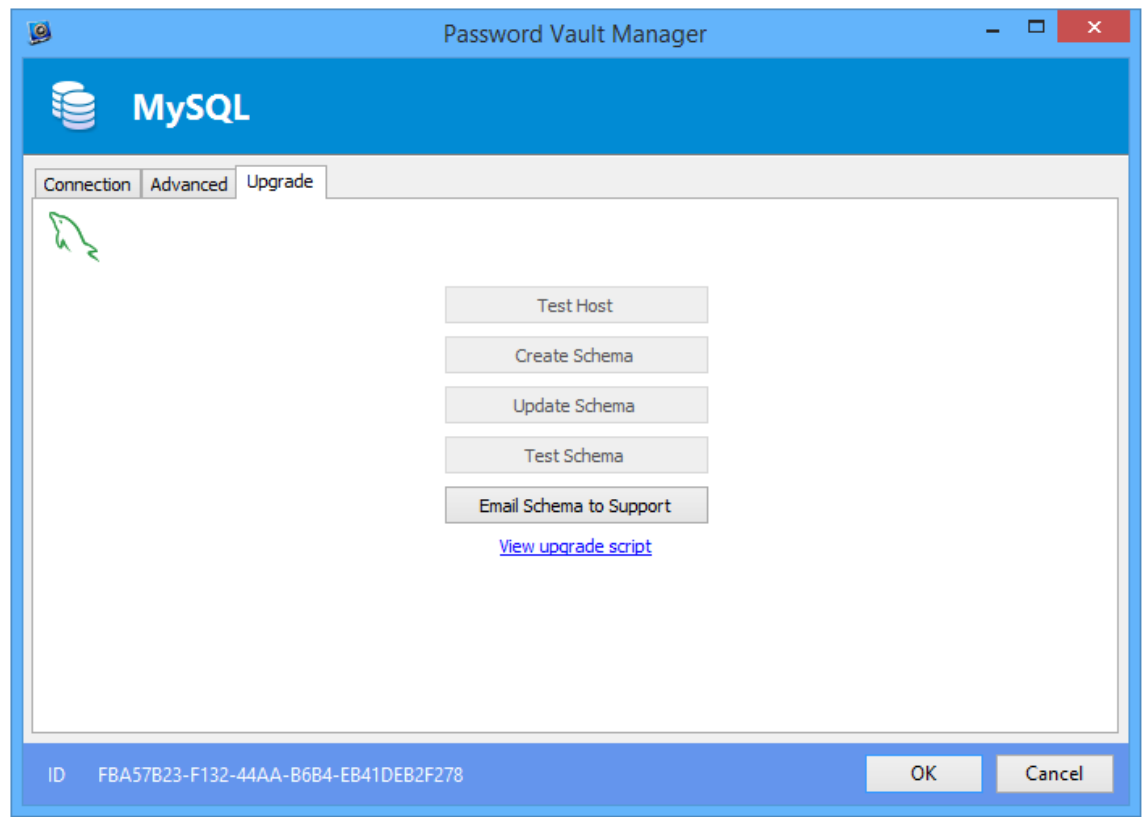


#### MySQL Advanced tab

Option	Description
Offline mode	Determine if you want to use this data source in <a href="#">Offline Mode</a> . In this mode, the data source can be available in Read Only or in Read/Write mode
Caching mode	Determine how the entries will be reload in the data source.
Auto refresh	Set the interval for the automatic refresh
Connection timeout	Waiting time before a connection timeout.
Command timeout	Waiting time before a command timeout.

Ping online method	Indicate if you would like to use the Port scan ping online method.
Auto go offline	If the ping online method doesn't respond it will automatically go offline.
Clear offline cache	Will clear the offline cache on your computer. This can be very helpful if you have offline issues.
Advanced Settings	Edit the connection string values directly.

### Upgrade



#### MySQL Upgrade tab

Option	Description
Test Host	Test the connection with the host (server) to validate if the proper information has been provided.
Create Schema	Create the schema on the MySQL server to use .
Update Schema	Update the schema on the MySQL server, if required, to use .
Test Schema	Test the connection with the schema to validate if the proper information has been provided.
Email Schema to Support	Send your schema to the Devolutions Support team.



### 3.4.11.3 Online Database

#### Description



Remote Desktop Manager Online is a hosted repository managed by Devolutions. The Password Vault Manager client connects directly to the data source. For details on this service, please visit <https://online.remotedesktopmanager.com>.

#### Highlights

- No VPN required to access the data
- Full connection logs
- Hosted on Microsoft Windows Azure and Microsoft SQL Azure
- This data source allows user management with security groups
- The offline mode can be used when the server is unavailable, or when the user is on the road

For information on how to obtain a trial subscription, please consult [Settings](#).

#### 3.4.11.3.1 Settings

##### Description

##### Settings

##### Connection

Password Vault Manager

## Devolutions Online Drive

Connection Advanced

Name

☒ Use default Remote Desktop Manager Online credentials

Email

Password  [Forgot password](#)

[Create a free account](#)

Filename

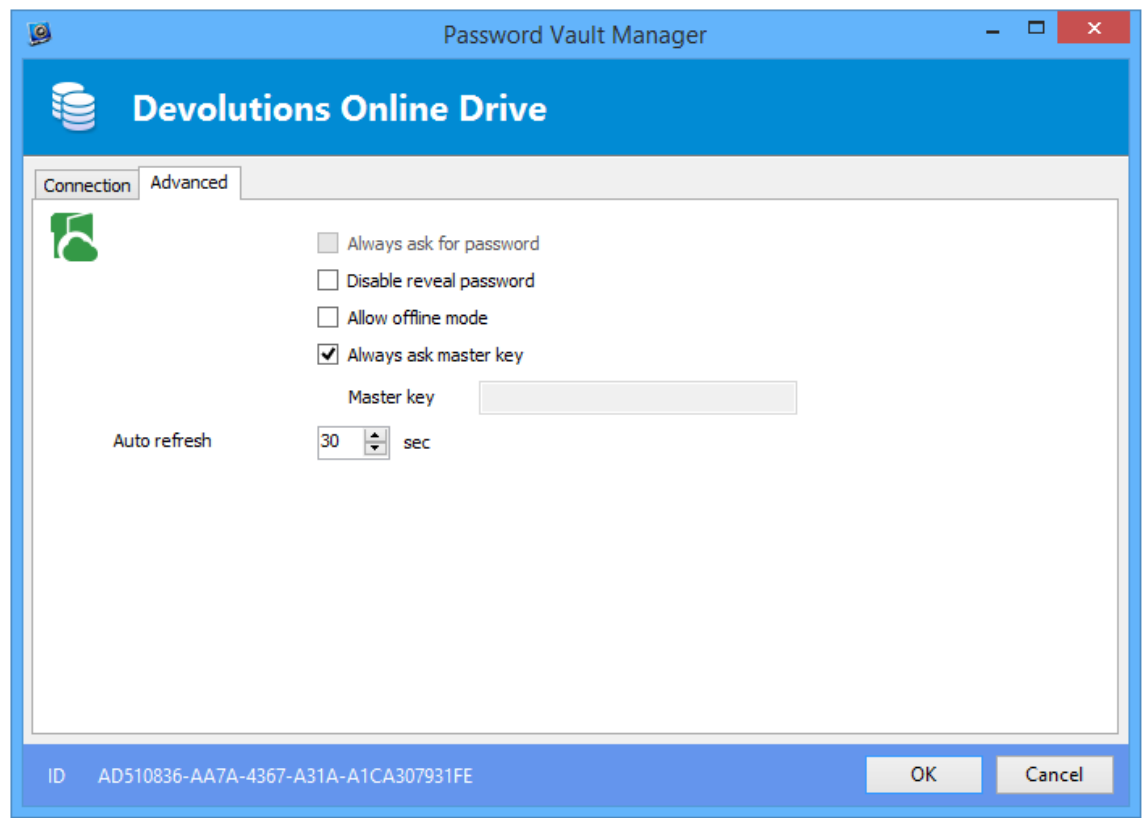
The file will be created if it does not exist

ID AD510836-AA7A-4367-A31A-A1CA307931FE

DODB Connection tab

Option	Description
Name	Name of the data source.
Email	If you haven't checked the Use default Remote Desktop Manager Online credentials, then you will have to enter an email address to use to connect online.
Password	Always ask for email when connecting to the data source.
Forgot password	Will bring you to our Devolutions Online website where you will be able to reset your password.
Create a free account	If you don't already have an account, it will allow you to create your account.
Filename	Enter your filename, if the file does not exist it will automatically create one.
Always ask password	Always ask for password when connecting to the data source.
Test Connection	Click on the link to test your connection.

**Advanced**



DODB Advanced tab

Option	Description
Always ask for password	Always ask for password when connecting to the data source.
Disable reveal password	Will disable the option for users to see the password.
Allow offline mode	Determine if you want to allow users to use this data source in offline mode. In offline mode, the data source can be available in Read Only or in Read/Write mode.
Always ask master key	Will ask for your master key every time you start your Devolution Online Drive Database.
Master key	Enter your master key.
Auto refresh	Set the interval for the automatic refresh.

#### 3.4.11.4 SQL Azure

##### Description



Password Vault Manager uses the Microsoft's cloud platform to save and manage all sessions.

We also support the following features:

- ***Always on availability group***
- ***Clustering***
- ***Log Shipping***
- ***Database mirroring***

## Highlights

- This data source allows user management with a superior security model
- The [Offline Mode](#) can be used when the server is unavailable, or when the user is on the road
- Full connection log and attachment support
- The data source supports an auto refresh at your preferred interval
- Microsoft SQL Azure can be used to create an online database. Get more detail on SQL Azure [here](#)



A proper database backup strategy should be implemented to minimize possible data loss.



To configure an SQL Azure data source, please read the [Configure SQL Server](#) topic.

## Settings

Consult [SQL Azure settings](#) topic for more information on the configuration.

### 3.4.11.4.1 Settings

## Description

### *Connection*

Password Vault Manager

## Microsoft SQL Azure

Connection Advanced Upgrade

Name

Server  SQL Azure  (Local) or IP or Server name

☐ Integrated security (Active Directory)

User  ☐ Editable

☒ Save password

Password

Database

Test Server

Test Database

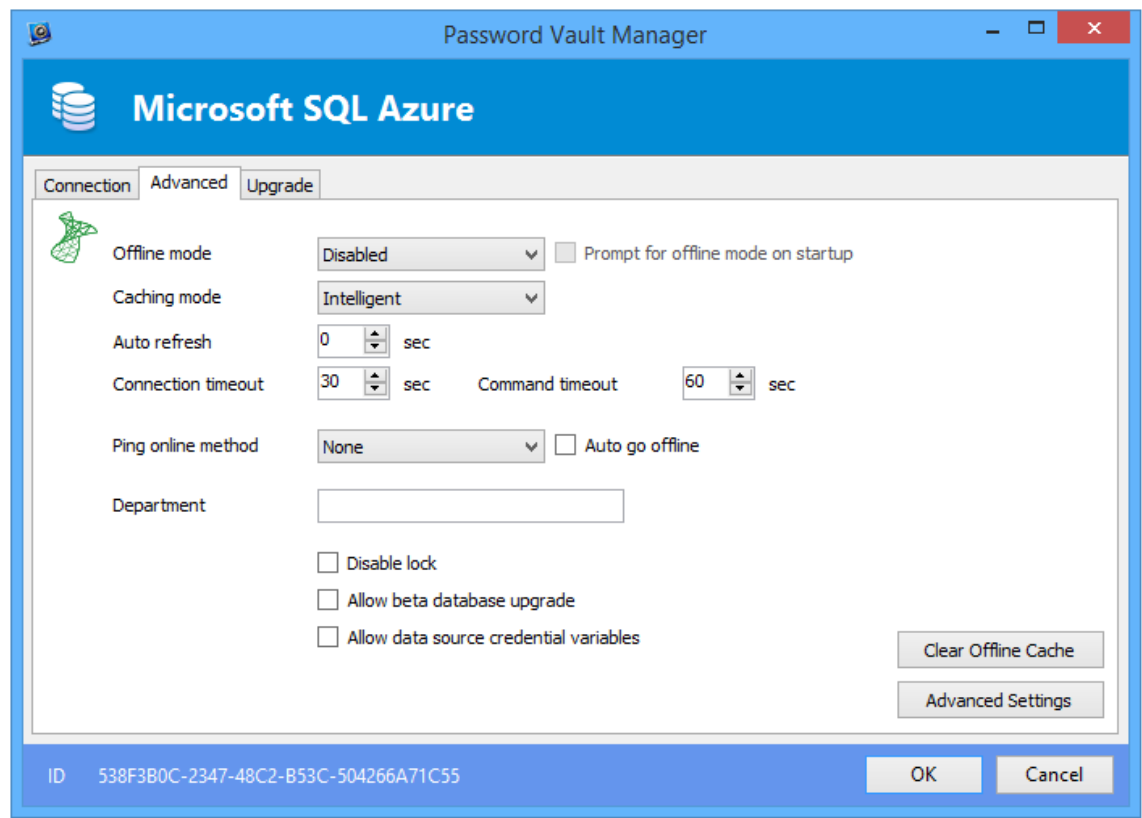
ID 74EE2697-FCD1-46D0-B184-0B12CCBD9FAB

OK Cancel

### SQL Azure Connection tab

Option	Description
Name	Name of the data source.
Server	Name of the server where the data source will be store.
Integrated security (Active Directory)	Specify to use Windows Integrated Authentication for authenticating to the data source. Applies only to SQL Server and RDMS, depending on their configuration. When checked, an ellipsis button appears to allow you to browse for the user account in the directory. Consult <a href="#">Integrated Security</a> topic for more information.
User	Username to access the SQL server.
Password	Password used to access the SQL server.
Database	Name of the database on the SQL server for the utilization of Password Vault Manager.
Test Server	Test the connection with the server to validate if the proper information has been provided.
Test Database	Test the connection with the database to validate if the proper information has been provided.

### Advanced

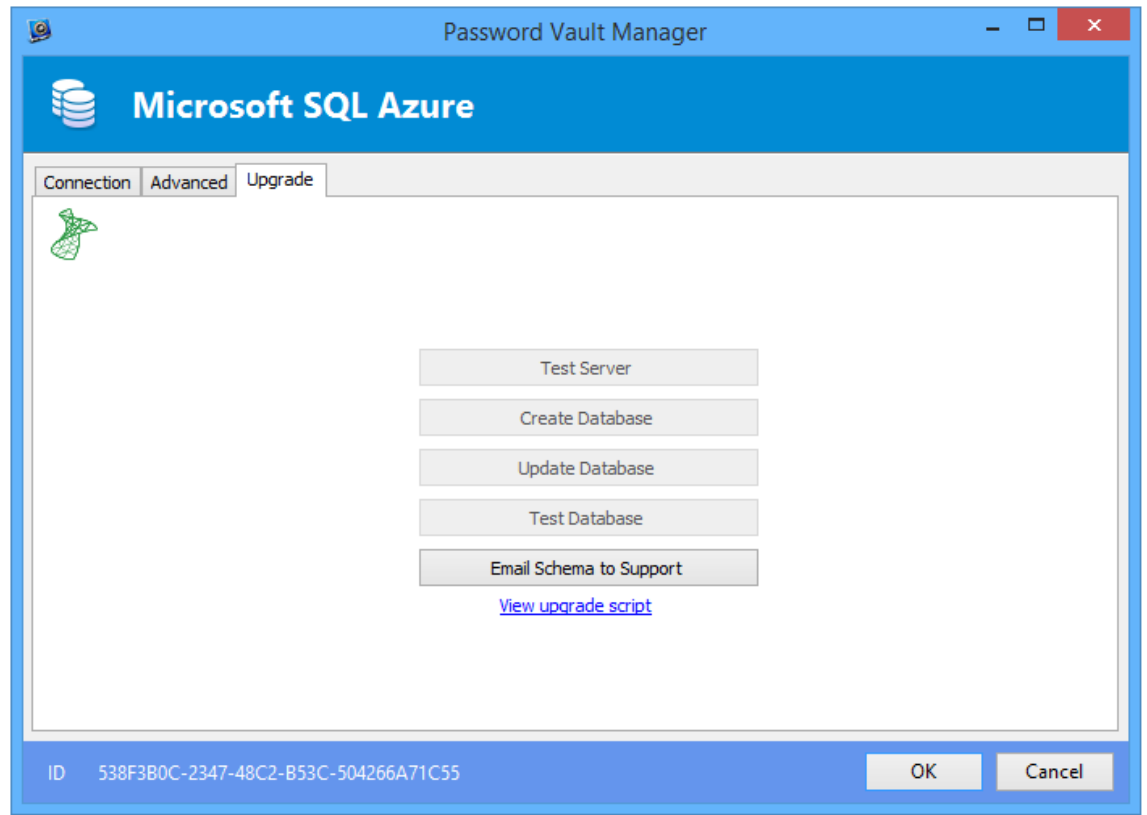


SQL Azure Advanced tab

Option	Description
Offline mode	Determine if you want to use this data source in <a href="#">Offline Mode</a> . With this mode, the data source can be available in Read Only or in Read/Write mode
Caching mode	Determine how the entries will be reload in the data source.
Auto refresh	Set the interval for the automatic refresh
Connection timeout	Waiting time before a connection timeout.
Command timeout	Waiting time before a command timeout.
Ping online method	Indicate the prefer ping online. Select between: <ul style="list-style-type: none"> <li>• <b>None</b></li> <li>• <b>Ping</b></li> <li>• <b>Port Scan</b></li> </ul>
Auto go offline	If the ping online method doesn't work it will automatically go offline .
Department	Departments are folder paths that will allow you to have a single database with multiple data sources.
Disable lock	Disable the option to lock the data source directly. You can still lock the application but you won't be prompted for the database password if this option is disabled.
Allow beta database upgrade	If an upgrade is required and you are using a beta version and database, it will authorize you to upgrade it.
Allow data source credential variables	Allow to use the data source credential to be use in variables.

Clear Offline Cache	Will clear the offline cache on your computer. This can be very helpful if you have offline issues.
Advanced Settings	Edit of the connection string values directly.

### Upgrade



SQL Azure Upgrade tab

Option	Description
Test Server	Test the connection with the server to validate if the proper information has been provided.
Create Database	Create the database on the SQL server to use Password Vault Manager.
Update Database	Update the database on the SQL server, if required to use Password Vault Manager.
Test Database	Test the connection with the database to validate if the proper information has been provided.
Email Schema to Support	Send your schema to the Devolutions Support team.

### 3.4.11.5 Devolutions Server

#### Description



Devolutions Server is a self-hosted repository for storing and sharing your remote connections and credentials. You can find more information on the product's web site [here](#).

## Highlights

- High-end security server for your company
- Share your sessions with multiple users
- Can be deployed online
- Support Windows authentication and Active Directory group integration
- Client and server side caching optimization
- Requires the Remote Desktop Manager Enterprise client (included with the server license)



Devolutions Server supports only SQL Server as a data store at this time.

## Configure the server data source on all your client machines.

Enter a name of the data source and the URL for the server. Ensure you use the correct protocol if SSL is required by the server (https).

Alternatively, you can export the data source information and then import the file in your client workstations as described [Import/Export Data Source](#).

## Settings

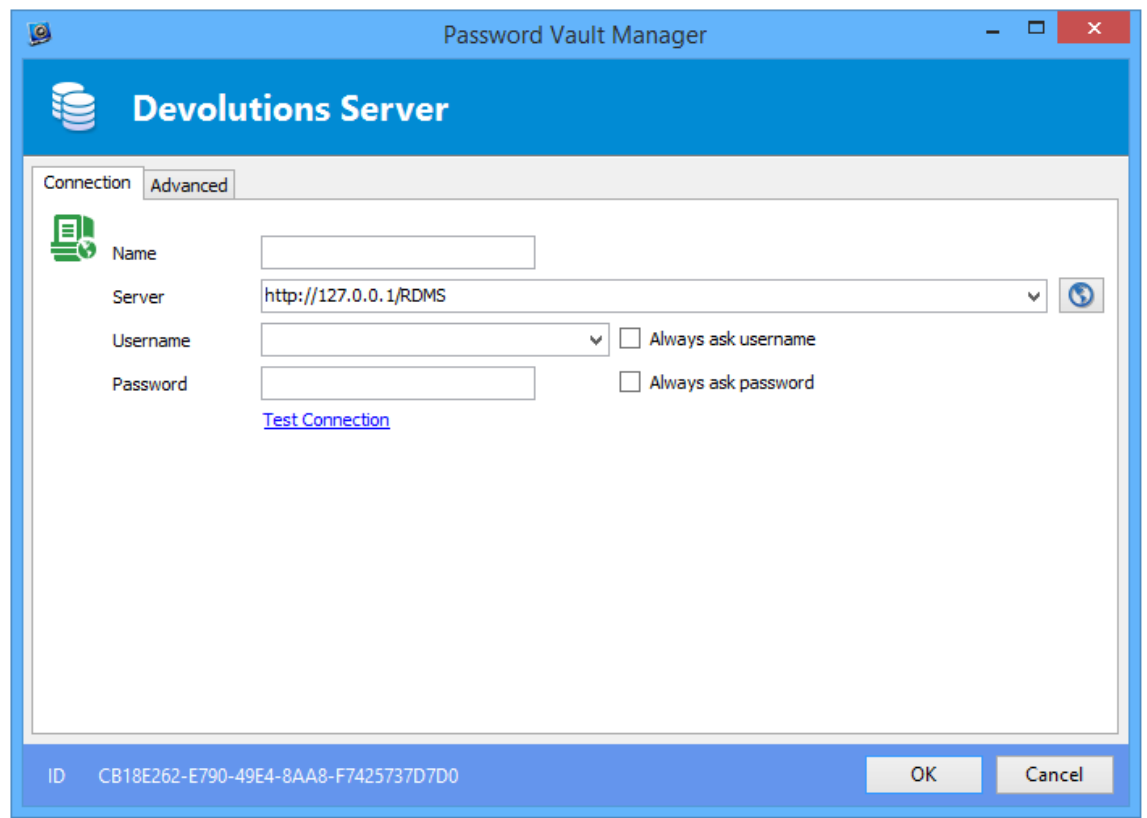
Consult [Devolutions Server settings](#) topic for more information on the configuration.

### 3.4.11.5.1 Settings

## Settings

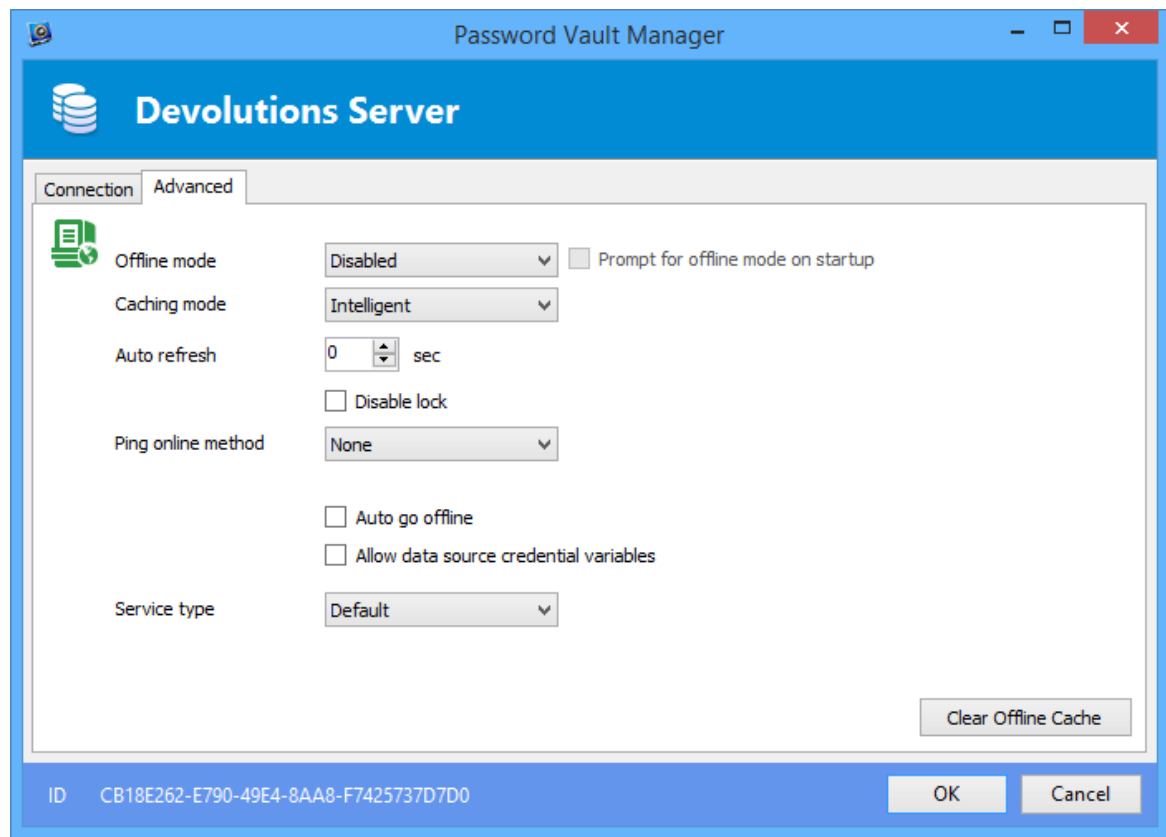
### *Connection*



**Devolutions Server Connection tab**

Option	Description
Name	Name of the data source.
Server	Name of Remote Desktop Manager Server instance.
Username	Username to connect to the data source.
Password	Password to connect to the data source.
Test connection	Test the connection with Devolutions Server to validate if the proper information has been provided.
Always ask username	Always ask for the username when connecting to the data source.
Always ask password	Always ask for the password when connecting to the data source.
Test Connection	Test your connection to your data source

**Advanced**



Devolutions Server Advanced tab

Option	Description
Offline mode	Determine if you want to use this data source in offline mode. In offline mode, the data source can be available in Read Only or in Read/Write mode.
Prompt for offline mode on startup	Every time you will connect on your data source, you will be prompt to use the data source in offline mode.
Caching mode	Determine how the entries will be reload in the data source.
Auto refresh	Set the interval for the automatic refresh.
Disable lock	Disable the option to lock the data source.
Ping online method	Indicate the prefer ping online method. Select between: <ul style="list-style-type: none"> <li>• <b>None</b></li> <li>• <b>Web request</b></li> </ul>
Auto go offline	If the ping online method doesn't work it will automatically go offline.
Allow data source credential variables	Allow to use the data source credential to be use in variables.
Service type	Indicate the prefer Service type. Select between: <ul style="list-style-type: none"> <li>• <b>Default</b></li> <li>• <b>Web API Client</b></li> <li>• <b>Web service client</b></li> </ul>
Clear offline cache	Will clear the offline cache on your computer. This can be very helpful if you have offline issues.

# Entry Types

**Part**



**IV**

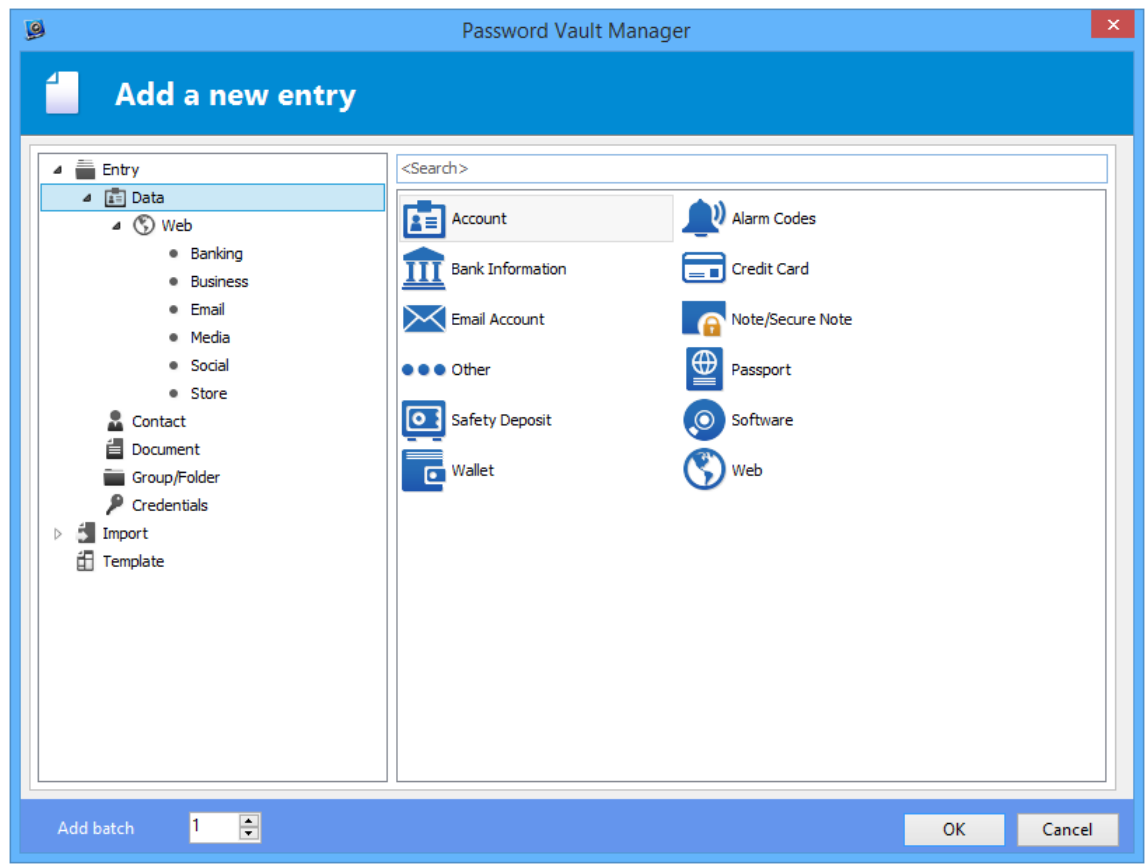
## 4 Entry Types

### 4.1 Data Entries

#### 4.1.1 Overview

##### Description

Data entry types are used to store sensitive information like account, alarm codes, bank information, credit card information, email account, note/secure note, passport information, safety deposit, software, wallet, web and other into the data source.



New data entry dialog

## Settings

### General

The screenshot shows the 'Data Entry' window in Password Vault Manager. The 'General' tab is selected in the left sidebar. The main area contains the following fields and options:

- Name:** A text input field.
- Group/folder:** A dropdown menu.
- Security group:** A dropdown menu set to '<None>'. There is a checkbox for 'View URL embedded'.
- Display:** A dropdown menu set to 'Embedded (tabbed)'. A 'Primary monitor' dropdown is also present.
- Website:** A text input field with a globe icon.
- Machine name:** A text input field with a label 'Employee'.
- Account:** A section containing:
  - Username:** Text input.
  - Domain:** Text input.
  - Password:** Text input with a strength indicator.
  - ☐ Password only available to administrator
  - ☒ Enable web browser extension link
  - ☐ Use regular expression
  - \* Password will be cleared from the Clipboard after 10 sec
  - [Advanced Settings](#)

At the bottom, there is a 'View Variable List' button and 'OK'/'Cancel' buttons.

Data entry common settings - General tab

Description	
Name	The name of the data entry that appears in the data entries list.
Group/Folder	This is used to organize the session in different folders, either in the <a href="#">tray icon</a> context menu or in the tree view. Learn more <a href="#">here</a> .
Security Group	In the Enterprise edition, allows the Administrator to assign a security group to an entry, and therefore limit a subset of users to view this entry.
View URL embedded	View the Url of the web page for this entry. Url will be used to navigate to the web site.
Open in modal window	Will open the browser in a modal window.
Display	<p><b>External:</b> External mode session are opened as an external process.</p> <p><b>Embedded/Tabbed mode:</b> Will run within the confines of the Password Vault Manager window and displays the tabs at the top of the window.</p> <p><b>Undocked:</b> Will create a new window to contain the tabbed session and will allow you to move it anywhere else.</p>
Primary monitor	If you have selected the Undocked mode in the Display option you will be able

	<p>to chose in which monitor to open your window:</p> <p><b>Primary monitor:</b> This is the monitor that is marked as "main display" in Window.</p> <p><b>Secondary monitor:</b> The other non-primary monitor, obsolete, use Monitor #1, 2, 3, 4 instead.</p> <p><b>Current monitor:</b> The monitor that Password Vault Manager is running in.</p> <p><b>Configured:</b> See Systems Options.</p> <p><b>Default:</b> Will not move the application, it will be Windows default mode.</p> <p><b>Monitor #1:</b> Monitor #1 is primary.</p> <p><b>Monitor #2:</b> Monitor #2 is primary.</p> <p><b>Monitor #3:</b> Monitor #3 is primary.</p> <p><b>Monitor #4:</b> Monitor #4 is primary.</p>
Website	Enter the Url of the web page for this entry. Url will be used to navigate to the web site.
Machine name	Machine name. Used to store the host name vs the DNS name.
Employee	Employee name.

As well as the fields described above, additional tab pages contain many data fields and options for your sessions.

Description	
More	Contains the following sections : <a href="#">Description</a> , <a href="#">Other</a> and <a href="#">Keywords/Tags</a> . The entry description can be in plain text, in rich text format, or a website link.
Information	Contains different types of information related to the data entry, such as the machine specifications, <a href="#">Computer</a> , <a href="#">Contact</a> , <a href="#">Custom Fields</a> or some useful notes. Custom information can also be added.
Sub Connections	Contains the sub connections linked to this entry. It's possible to use variables that refer to this entry's fields, such as the host name, from within sub connections. This is useful for connecting to the same host with different protocols. Please see <a href="#">Sub Connections Overview</a> for more details.
Attachments	Manages the entry's attachments. Used to add, edit and delete the linked files. Please see <a href="#">Attachments Overview</a>
Logs	Contains the session logs and other related options. For example, entering a comment when opening a session can be made mandatory. Please see <a href="#">Log Options</a>
Advanced	Contains advanced settings related to the entry, such as the internal data source ID and session ID. These values can be used to invoke Password Vault Manager from a command line to open the entry, or to run a batch modification. Please see <a href="#">Advanced settings</a>

## 4.1.2 Auto Fill

### Description

The Auto Fill feature will enter the user name and password defined in a entry, into the web site login controls. For this feature to work you need to have a browser extension installed and configured properly. The most popular Windows based browsers are supported : Google Chrome, Mozilla Firefox and Microsoft Internet Explorer.

## Installation

Refer to these topics for your browser of choice. You can use many of them concurrently without causing issues in Password Vault Manager.

- [Chrome Extension](#)
- [Firefox Extension](#)
- [IE Extension](#)

## Creating Data Entries

Web & Account data entry types both support Auto Fill. They must however be configured to allow web browser extension links. The Url field must be the url of the login page for the given page (Ex. <http://login.live.com/>). You must also enable the **Enable web browser extension link** option.

The screenshot shows the 'Data Entry' window in Password Vault Manager. The 'General' tab is selected on the left sidebar. The 'Name' field is 'Windows Live'. The 'Website' field is 'https://login.live.com/'. The 'Display' dropdown is set to 'Embedded (tabbed)'. The 'Open in modal window' checkbox is checked. The 'Machine name' field is 'Employee'. The 'Web' tab is active, showing the 'Credentials' section with 'Default' selected. The 'Enable web browser extension link' checkbox is checked. The 'Use regular expression' and 'Password only available to administrator' checkboxes are unchecked. The 'Template' button is visible. The 'View Variable List' button is at the bottom left. The 'OK' and 'Cancel' buttons are at the bottom right.

Auto fill support

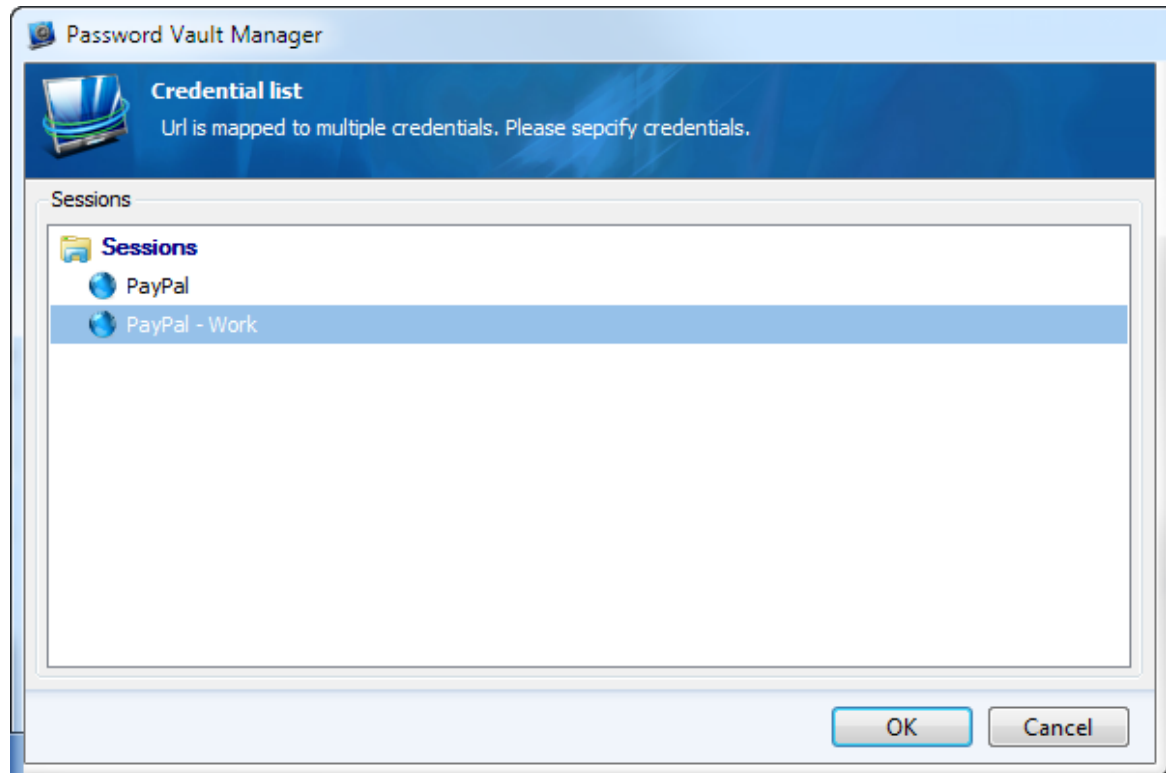
## Troubleshoot

Data entries must be marked (checked) as **Enable web browser extension link** for auto fill feature to

work.

If Password Vault Manager is configured with multiple data sources only the currently active data source will be queried.

When multiple data entries match the web site Password Vault Manager will prompt for you to select a specific data entry.



Select specific data entry

#### 4.1.2.1 Chrome Extension

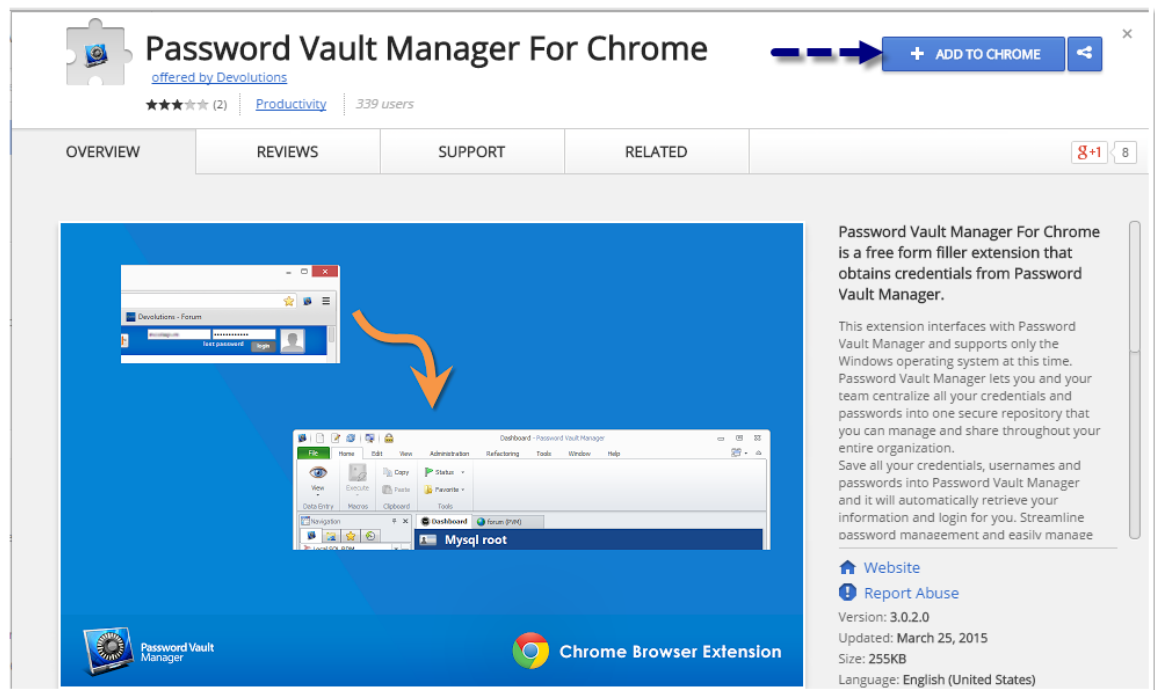
##### Description

Password Vault Manager - Chrome Extension

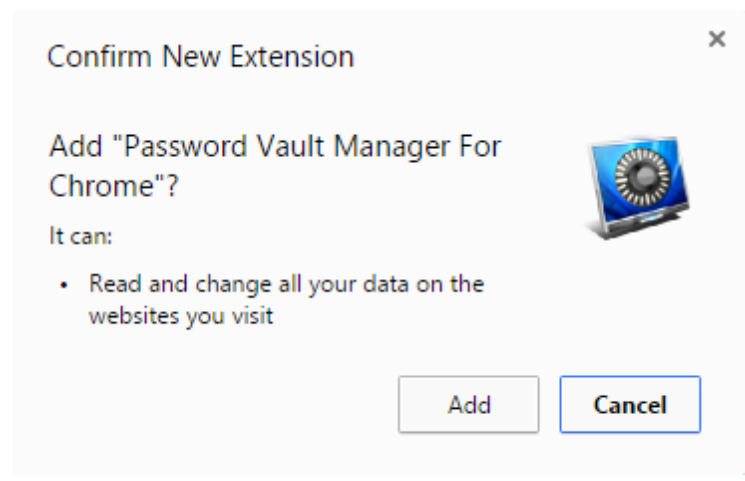
##### Installation

- Start Chrome
- Go [here](#) & download the .crx file Password Vault Manager for Chrome Extension
- Click on **Add to Chrome**



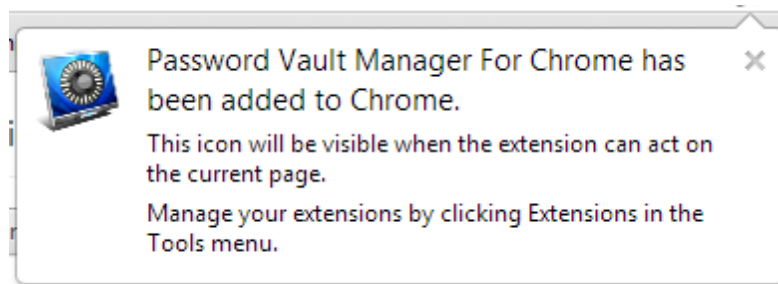


- Click on **Add**



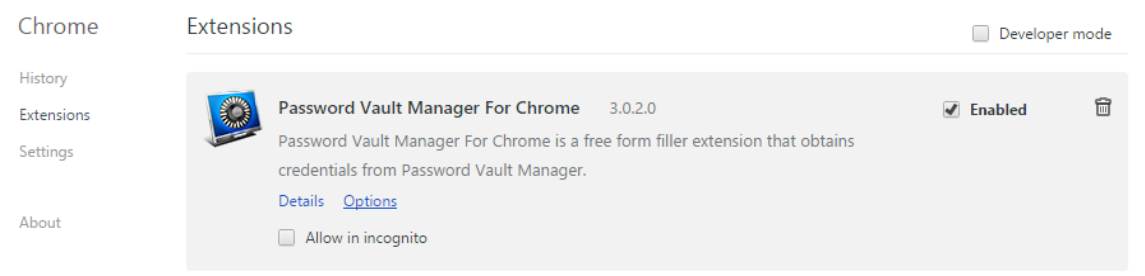
#### Confirm Chrome Extension Installation

- Installation is now complete, you should see a confirmation window



Password Vault Manager> For Chrome is now installed

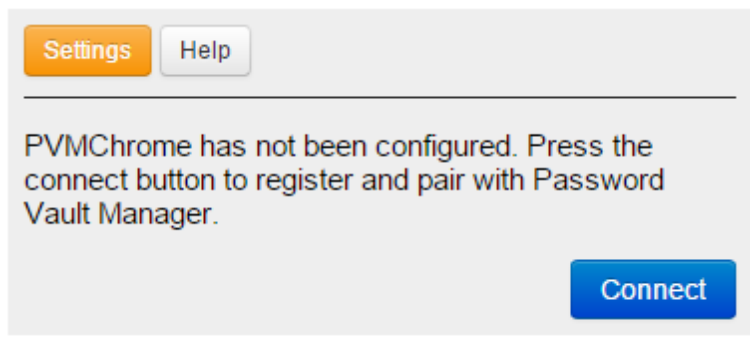
- To view/manager all installed Chrome extensions go to **More Tools - Extensions**



Password Vault Manager For Chrome is now installed

## Using

- Open Password Vault Manager if not already started
- You will need to configure the Password Vault Manager for Chrome extension of first use



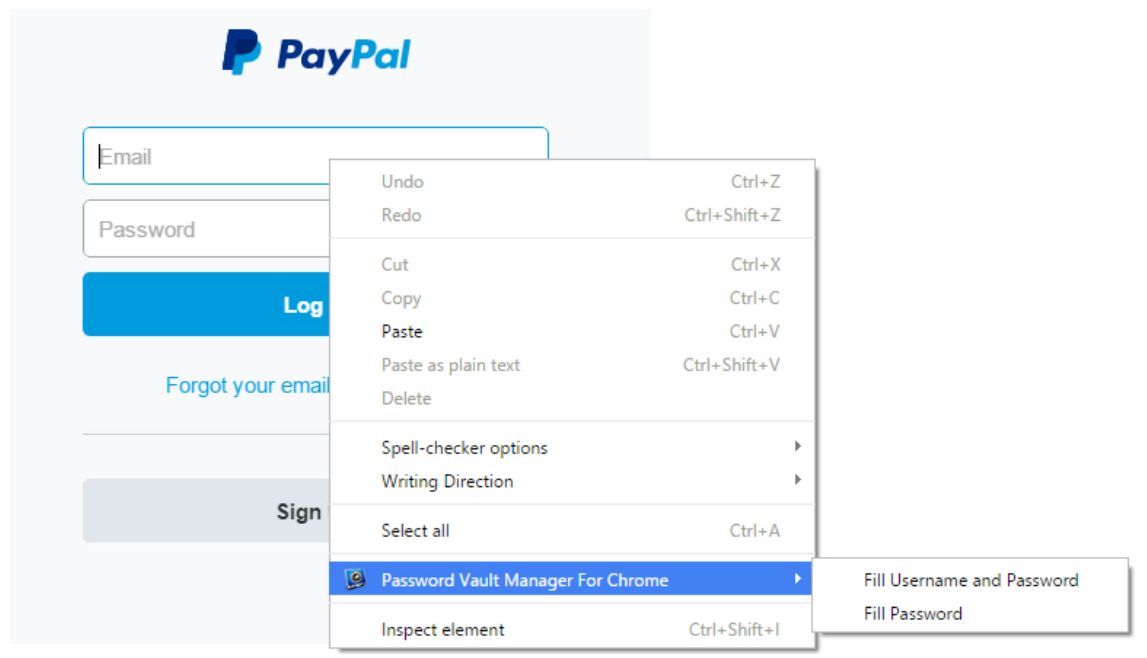
Connect Extension to Password Vault Manager

- Open a web site that has been configured in Password Vault Manager
- Check the status of the extension



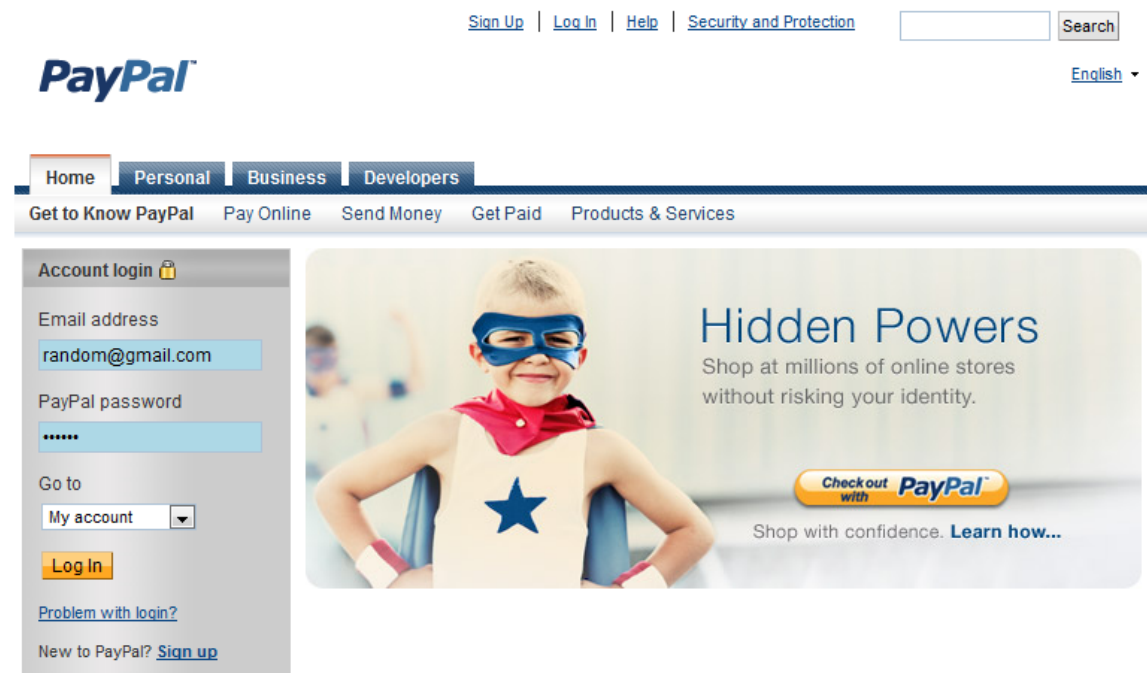
Connect Extension to RDM

- Right click in either the username or password field and select the fill option



Select Fill Option

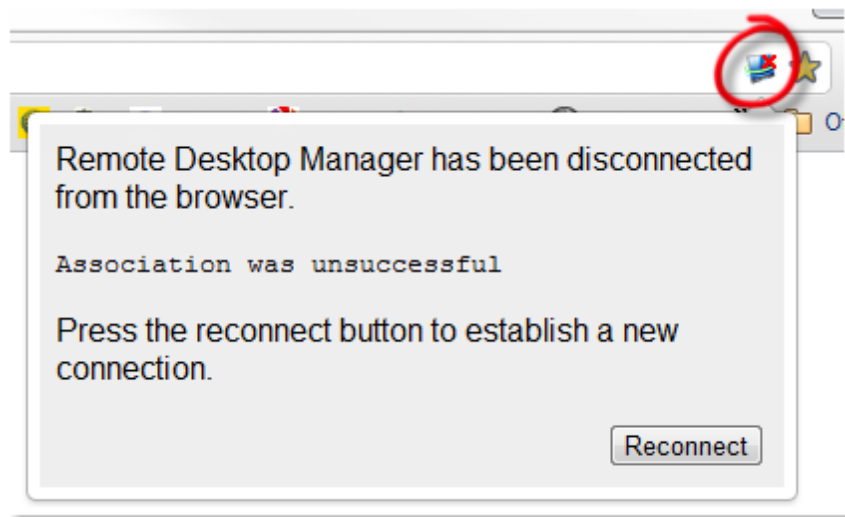
- Result



Sample web site populated with Password Vault Manager auto fill feature

## Troubleshoot

If an error occurs the extension icon will show the error icon. Simply click on the icon for further information.



Sample Extension Error

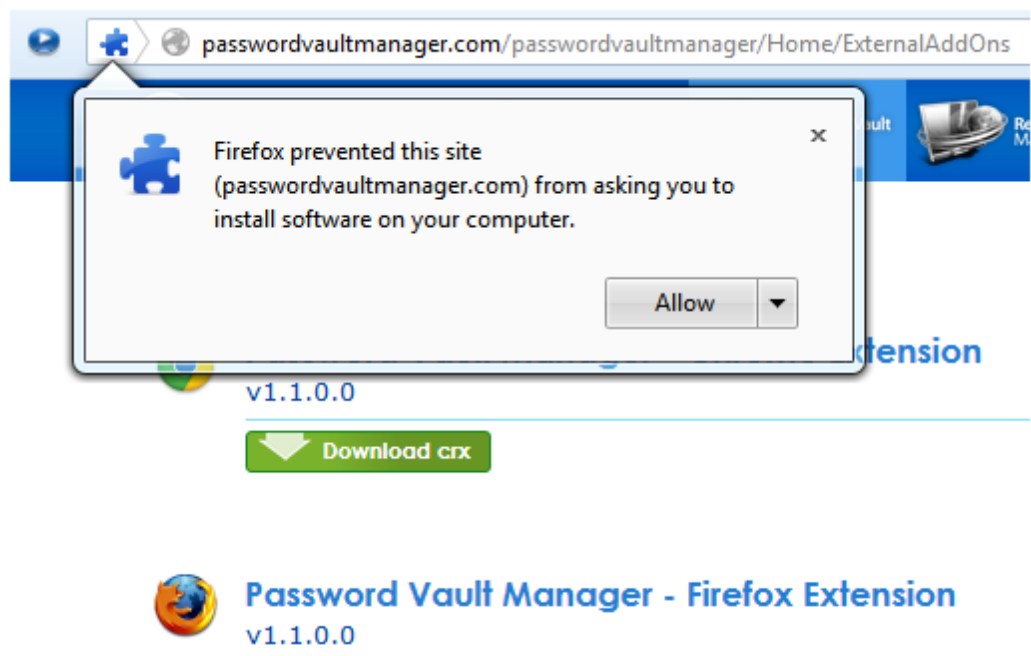
#### 4.1.2.2 Firefox Extension

##### Description

Password Vault Manager - Firefox Extension

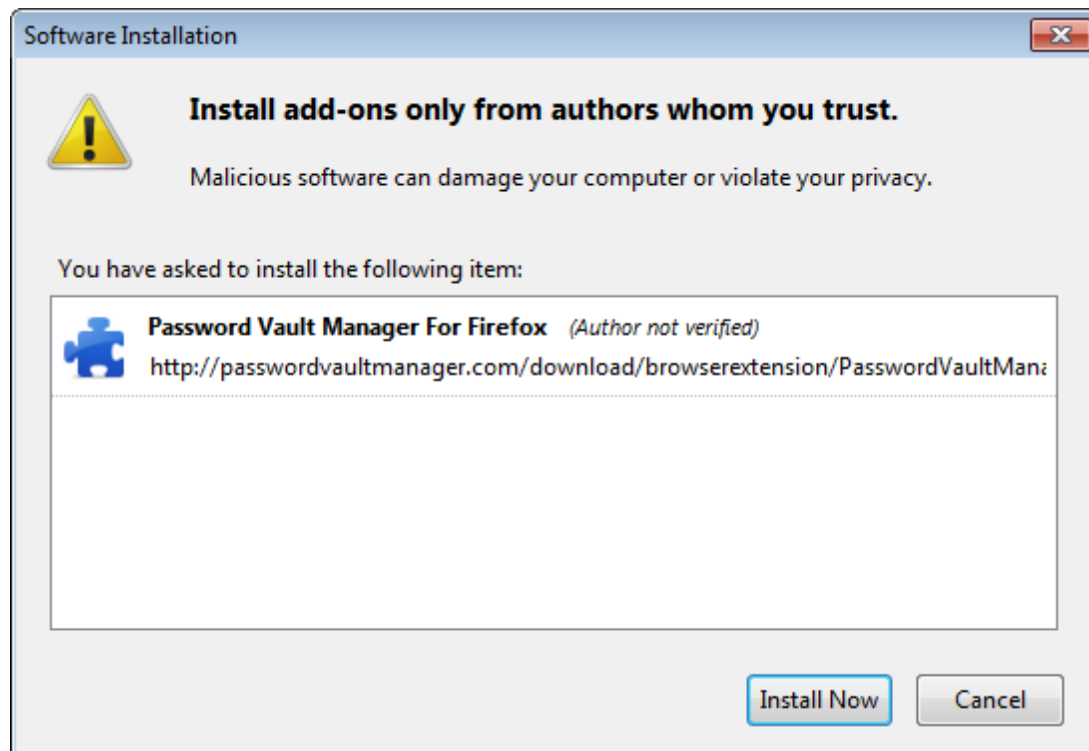
##### Installation

- Start Firefox
- Go [here](#) & download the .xpi file Password Vault Manager - Firefox Extension



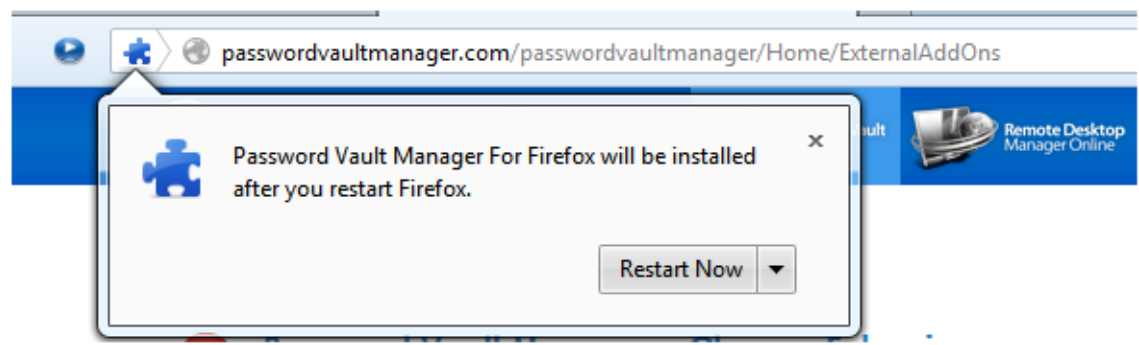
Allow Password Vault Manager Firefox Extension

- Confirm the installation



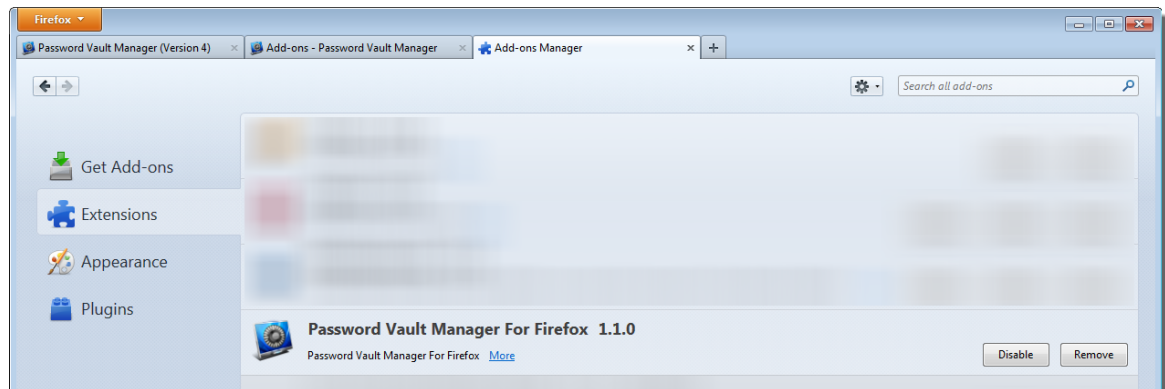
Confirm Password Vault Manager Firefox Extension Installation

- Restart Firefox



Restart Firefox

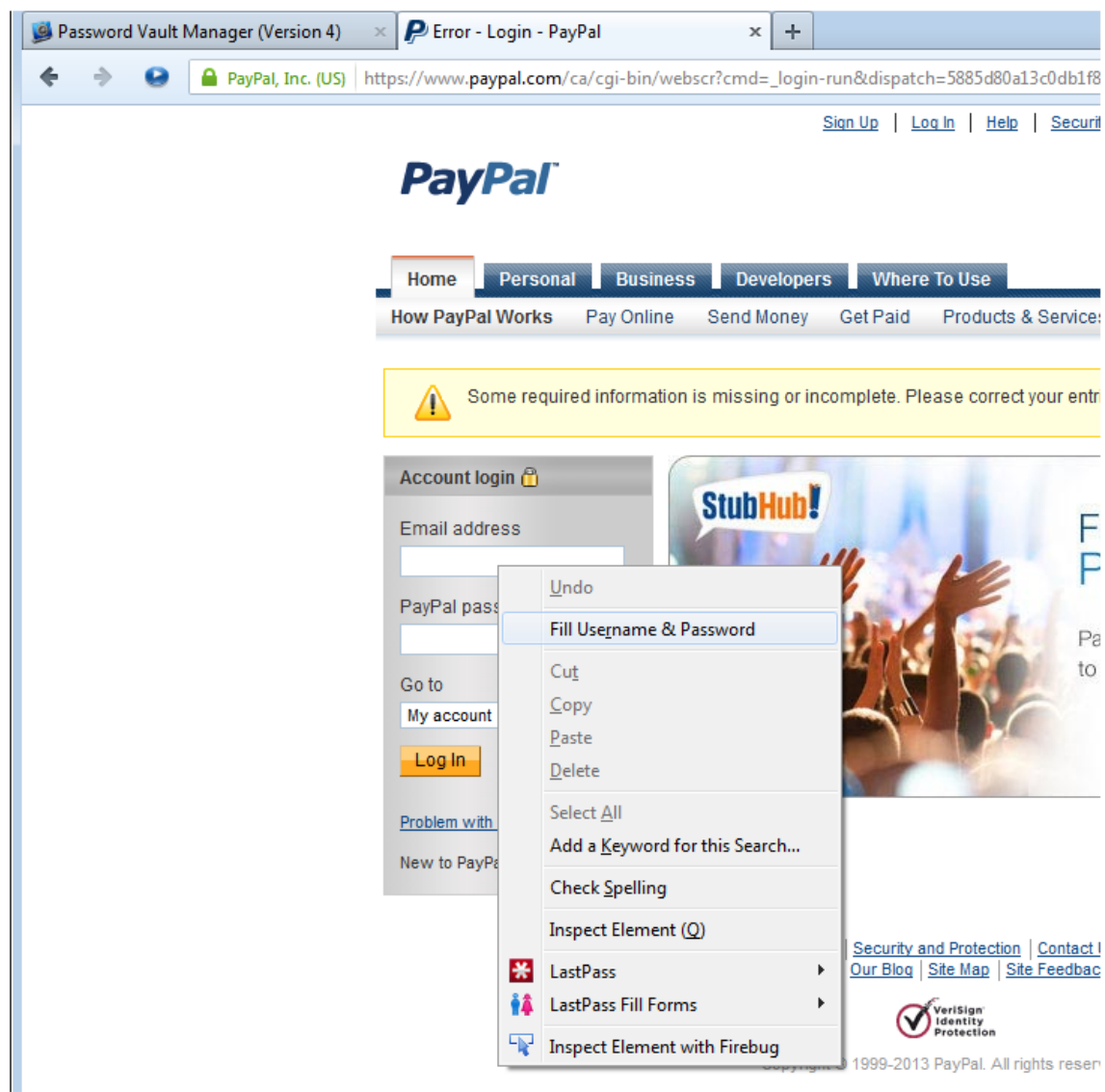
- To view/manager all installed Firefox extensions see Add-ons menu



**Password Vault Manager For Firefox is now installed**

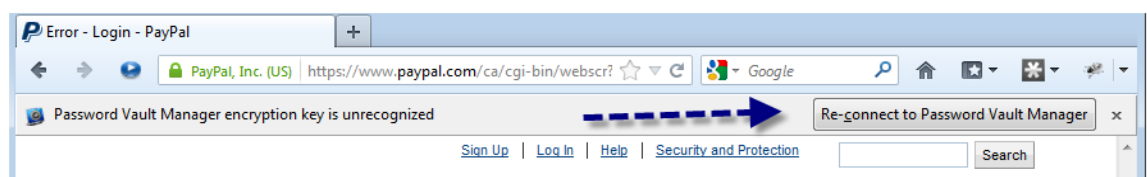
## Using

- Open Password Vault Manager if not already started Password Vault Manager
- Right click in either the username or password field and select the fill option



#### Select Fill Option

- You will need to configure the Password Vault Manager for Firefox extension on first use



#### Connect Extension to RDM

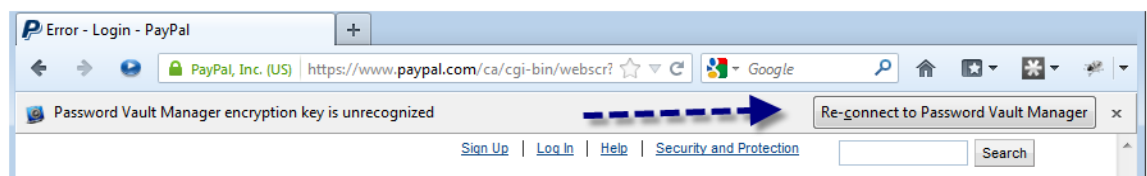
- Right click again
- Result



Sample web site populated with Password Vault Manager auto fill feature

## Re-connecting

You will need to re-configure the Password Vault Manager for Firefox extension every time use a different datasource within the browser.



Password Vault Manager for Firefox extension re-connect message.



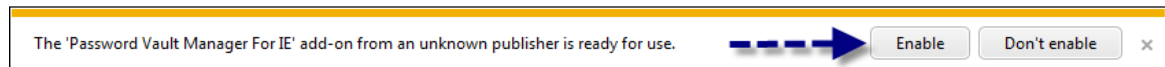
### 4.1.2.3 IE Extension

#### Description

Web browser auto fill is only available for Internet Explorer 8 or better.

#### Installation

- Download ([here](#)) & install the Internet Explorer Extension
- Start Internet Explorer
- If prompted to enable, make sure to enable

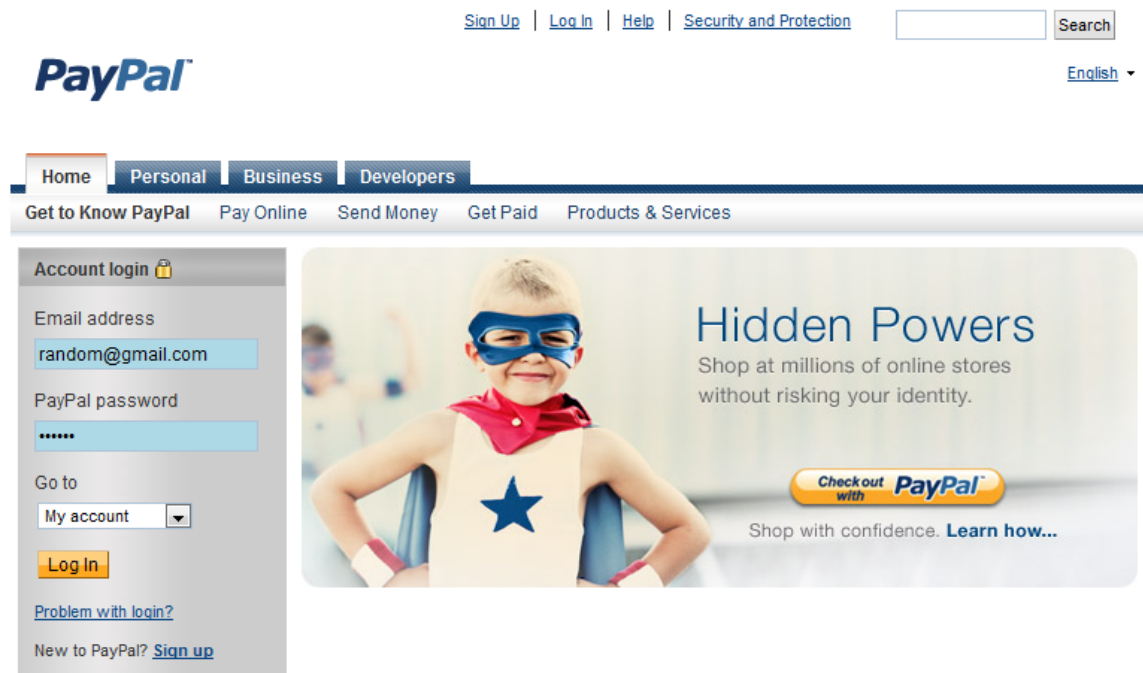


#### Enable Password Vault Manager For IE add-on

- Restart Internet Explorer

#### Using

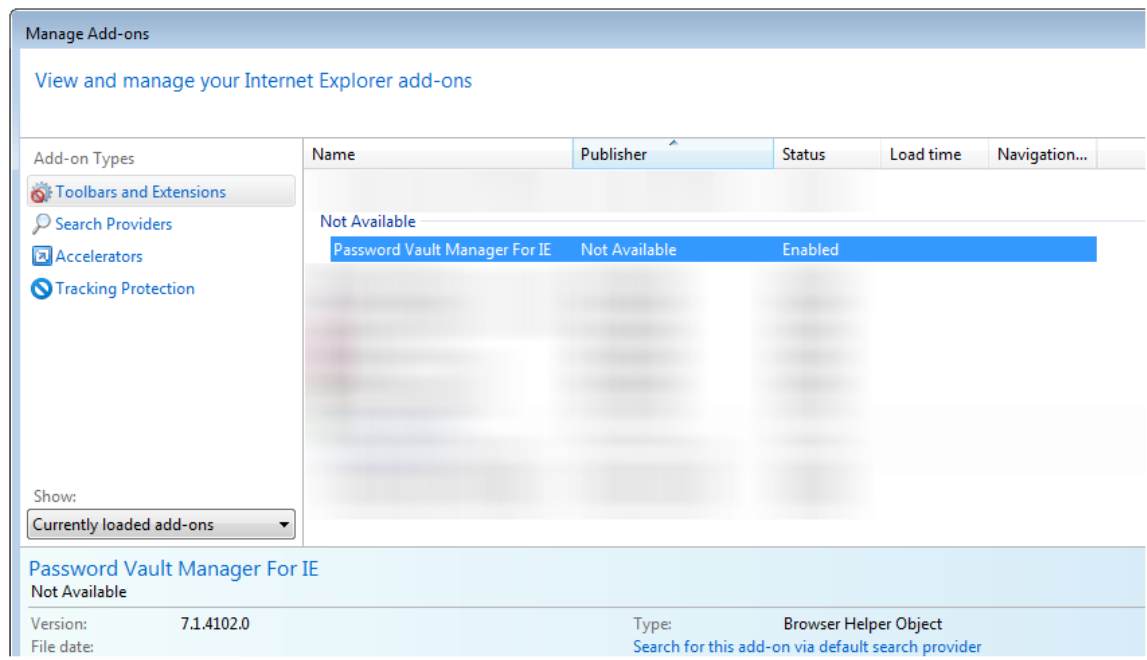
- Open Password Vault Manager if not already started
- Open a web site that has been configured in Password Vault Manager, you should have the username & password automatically populated and both text boxes should now be light-blue



Sample web site populated with Password Vault Manager auto fill feature

#### Troubleshoot

Double check that the add-on is in fact enabled. In Internet Explorer Manage add-ons window.



Enable/Disable Password Vault Manager for IE

### 4.1.3 Types

#### 4.1.3.1 Account


##### Description



The Account data entry type is used for storing account information including user name, domain & password.

##### Settings



Account


Username

Domain

Password

☐ Password only available to administrator  
☒ Enable web browser extension link  
☐ Use regular expression  
\* Password will be cleared from the Clipboard after 10 sec



[Advanced Settings](#)

Data entry - Account settings

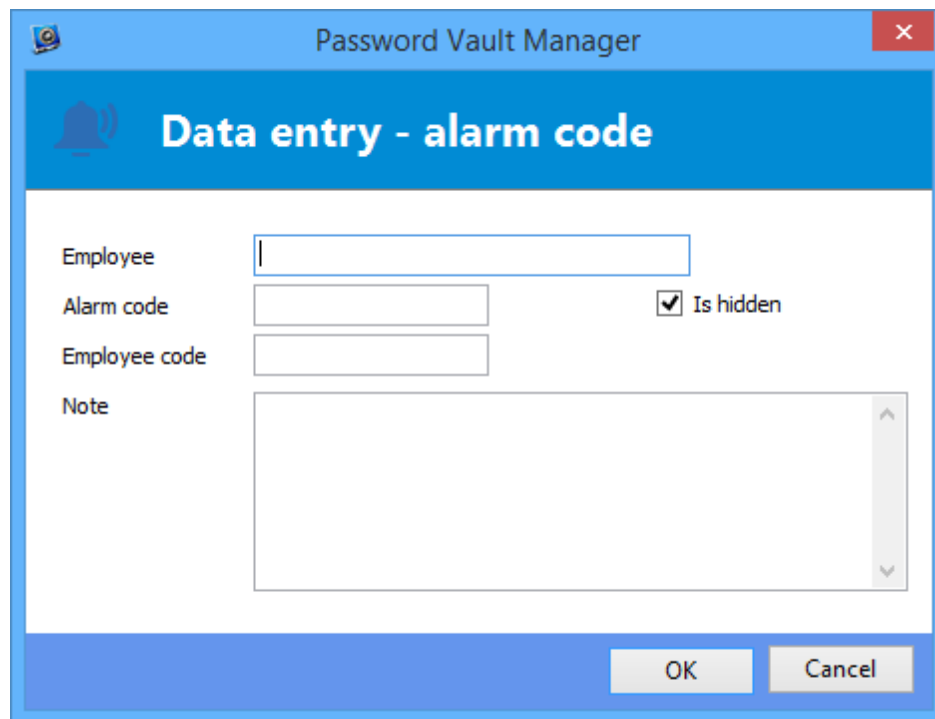
Name	Encrypted	Description
Username		The user name associated to the account
Domain		The domain associated to the account
Password	✓	The password associated to the account
Password only available to administrator		Must be administrator to be able to view the password
Enable web browser extension link		Data entry will be available for the <a href="#">auto fill</a> feature
Use regular expression		Will allow you to make the URL field accept regex expressions

#### 4.1.3.2 Alarm Codes

##### Description



The Alarm Codes data entry type is used for securely storing employee/alarm code pairings.



The screenshot shows a Windows-style dialog box titled "Password Vault Manager" with a close button (X) in the top right corner. The dialog has a blue header bar with a bell icon and the text "Data entry - alarm code". Below the header, there are four input fields: "Employee" (a single-line text box), "Alarm code" (a single-line text box with a checked checkbox labeled "Is hidden" to its right), "Employee code" (a single-line text box), and "Note" (a multi-line text area with a vertical scrollbar). At the bottom right of the dialog are two buttons: "OK" and "Cancel".


Data entry - Alarm code settings

## Settings

Name	Encrypted	Description
Employee		The employee name
Alarm code	✓	The alarm code
Is hidden		Is the alarm code hidden (secure). On export a hidden alarm code will be encrypted
Employee code		The employee code
Note		Alarm code note

## Actions

Alarm Codes



Name	Alarm Code	Employee Code
------	------------	---------------

Add

Edit

Delete


**Data entry Account settings**

Name	Encrypted	Description
View		View selected alarm code
Add	✓	Add new alarm code
Change		Change selected alarm code
Delete		Delete selected alarm code

**4.1.3.3 Bank Information****Description**

The Bank Information data entry is useful for storing sensitive banking information such as account number & PIN.

Bank Information



Bank name  
Bank branch  
Account type  
Account owner  
Account number  
Routing number  
PIN  
SWIFT  
Phone  
Address  
Contact

☐  
☐  
☐  
☐  
☐  
☐  
☐  
☐  
☐  
☐  
☐

Data entry - Bank Information settings

## Settings

Name	Encrypted	Description
Bank name		Reference bank name
Bank branch		Reference bank branch
Account type		Type of account
Account owner		The name of the owner of the account
Account number		Bank account number
Routing number		Insert the routing number
PIN	✓	Bank account PIN number
SWIFT		Enter your SWIFT account number
Phone		Bank phone number
Address		Bank address
Contact		Bank contact


### 4.1.3.4 Credit Card

## Description



The Credit Card data entry is useful for storing sensitive credit card information such as card number, PIN or CVC.

Credit Card



Card owner

Card type

Card number

Valid from

Expiration

PIN

Password

Verified by

Secure code

Issuing bank

Customer service phone

International service phone

☐ Is hidden

Validation (CVC)

Data entry - Credit Card settings

## Settings

Name	Encrypted	Description
Card owner		Credit card owner as it appears on the actual card
Card type		Card type, choose from the list or type in the card type if it is not available in the list
Card number	✓	Credit card number as it appears on the actual card
Valid from	✓	Valid from date as it appears on the actual card
Expiration	✓	Expiration date as it appears on the actual card
Validation (CVC)	✓	The 3 or 4 digit security code as it appears on the back of the card
PIN	✓	The PIN number for the card
Is hidden		Controls the security information for this card. If hidden is set all secured fields will be encrypted on export and hidden in view mode.
Password	✓	If you have a password that protects your credit card account
Verified by	✓	Name of who it is verified by.
Secure code	✓	Your secure code to have access to your credit card account.
Issuing bank		What bank is your credit card from.
Customer service phone		The customer service phone number.
International service		The International customer service phone number.

phone

#### 4.1.3.5 Email Account

##### Description



Securely store email account settings including POP3/IMAP/SMTP servers, user name & passwords.

##### Settings

Name	Encrypted	Description
Your name		Account name
Email		Email
S/MIME		Does this email account require/use Secure/Multipurpose Internet Mail Extensions

Email Account

General

POP3

IMAP

SMTP

Your name

Email

☐ S/MIME

##### Data entry - Email settings


Name	Encrypted	Description
Host name		POP3 host name
Username		POP3 user name
Port		POP3 port, default 110
Password	✓	POP3 password
SSL		POP3 requires SSL connection



Authentication	POP3 authentication mode
----------------	--------------------------

Email Account



General

POP3

IMAP

SMTP


Host name

Port

110

Username

Password



☐ SSL


Authentication

Password

Data entry email POP3 settings


Name	Encrypted	Description
Host name		IMAP host name
Port		IMAP port, default 110
Username		IMAP user name
Password	✓	IMAP password
SSL		IMAP requires SSL connection
Authentication		IMAP authentication mode

Email Account

 General POP3 IMAP SMTP

Host name  Port

Username

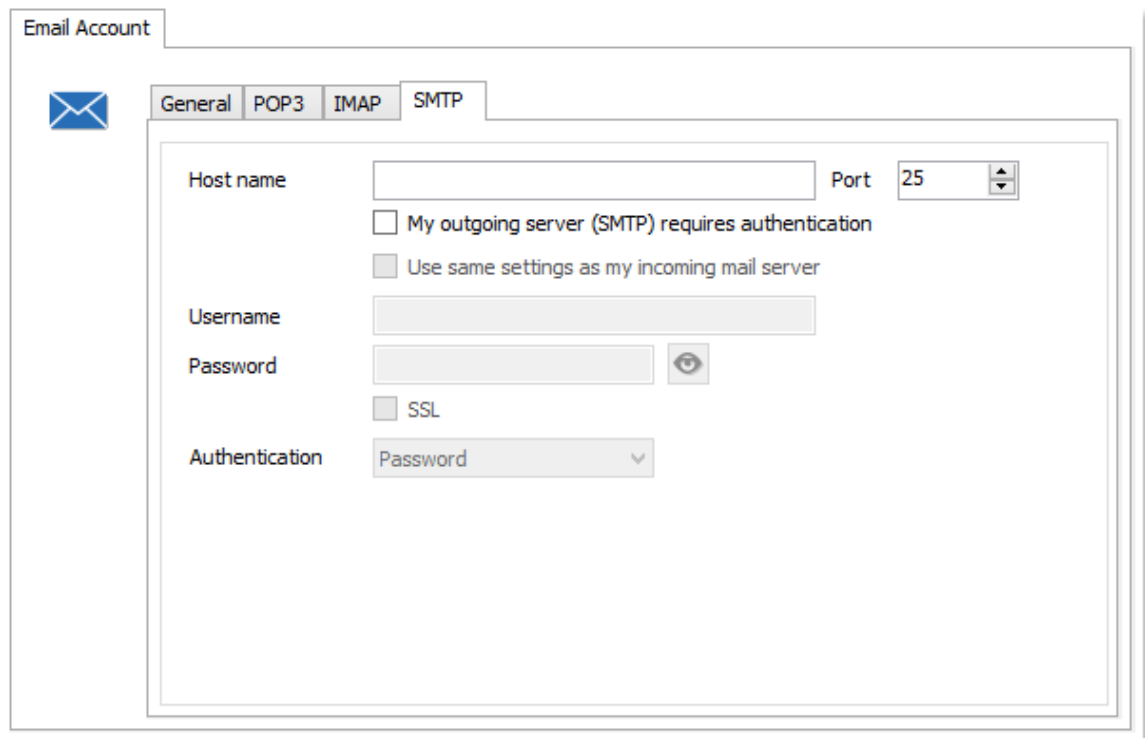
Password  

☐ SSL

Authentication

Data entry email IMAP settings

Name	Encrypted	Description
Host name		SMTP host name
Port		SMTP port, default 110
My outgoing server (SMTP) requires authentication		Does the SMTP server require authentication
Use same settings as my incoming mail server		Use POP3 or IMAP settings for the outgoing server authentication
User name		SMTP user name
Password	✓	SMTP password
SSL		SMTP requires SSL connection
Authentication		SMTP authentication mode



Email Account


General POP3 IMAP SMTP

Host name  Port

☐ My outgoing server (SMTP) requires authentication

☐ Use same settings as my incoming mail server

Username

Password  

☐ SSL

Authentication

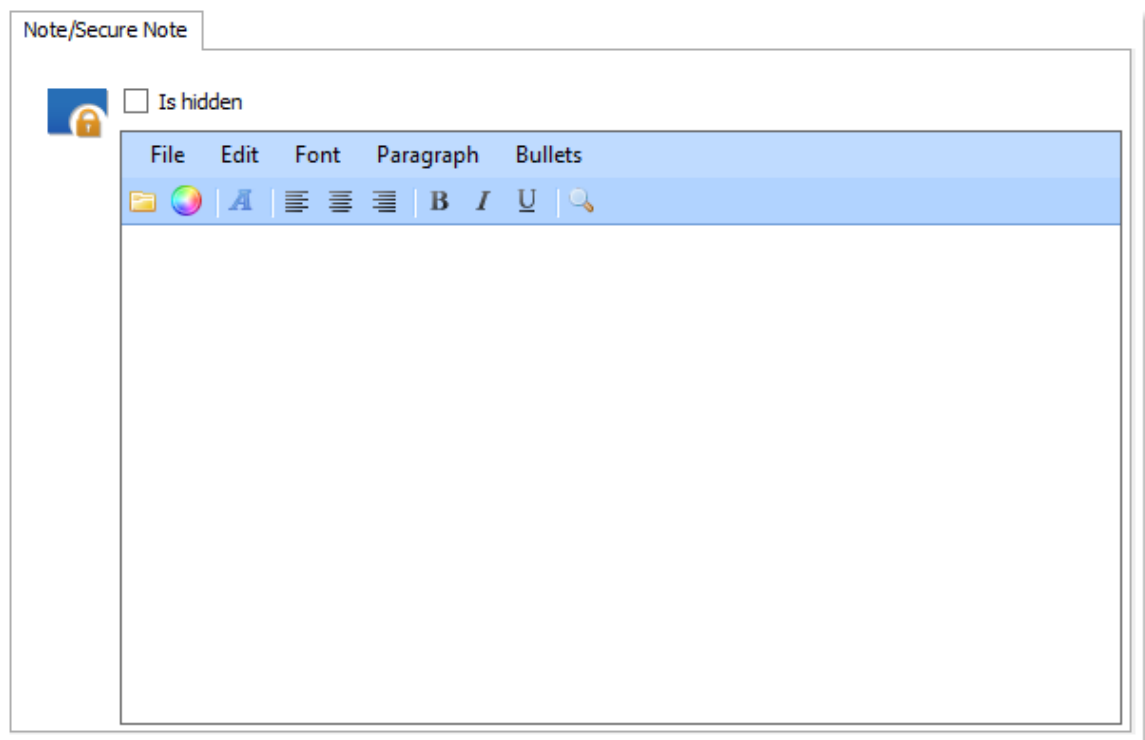
Data entry email SMTP settings

#### 4.1.3.6 Note/Secure Note

##### Description



Note data entry is a simple free form note allowing you to securely store any type of free form information.



Data entry - Note settings

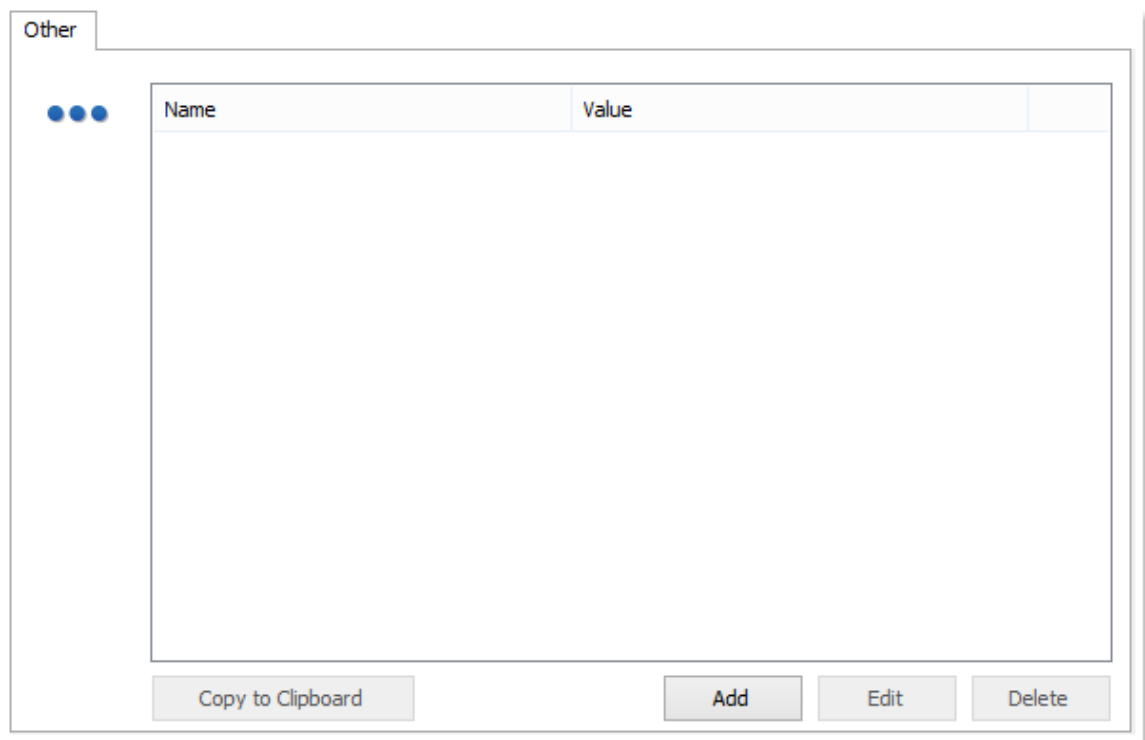
## Settings

Name	Encrypted	Description
Note	✓	Any free form RTF text
Is hidden		Controls the encryption of the note on export and view

### 4.1.3.7 Other

## Description

- ● ● The Other data entry type is used for securely storing name/value pairings of information.



Data entry - Other settings

## Settings

Name	Encrypted	Description
Name		Name of the settings
Value	✓	Value of the settings
Is hidden		Is the value hidden (secured). On export a hidden value will be encrypted

## Actions

- Copy to Clipboard - Copy the information to the clipboard
- Add - Add new name/value
- Edit - Change selected name/value
- Delete - Delete selected name/value


### 4.1.3.8 Passport

## Description




The Passport data entry is useful for storing your passport information such as your passport number and its expiration date.


Passport

 Last name

First / middle name

Gender ☒ Male ☐ Female

Passport number  

Expiration  

Country of issue

Data entry - Passport settings

## Settings

Name	Encrypted	Description
Name		Name of the settings
Value	✓	Value of the settings
Is hidden		Is the value hidden (secured). On export a hidden value will be encrypted

## Actions

- Copy to Clipboard - Copy the information to the clipboard
- Add - Add new name/value
- Edit - Change selected name/value
- Delete - Delete selected name/value

### 4.1.3.9 Safety Deposit


## Description



The Safety Deposit data entry is used to store your safety deposit information.

## Settings

Safety Deposit




Institution

Address


Customer service number

Box number

Passcode



**Data Entry - Safety Deposit settings**

Option	Encrypted	Description
Institution		Name of the institution
Address		Address of the institution
Customer Service Number		Customer service number
Box number		Personal Box number
Passcode		Personal Passcode

**4.1.3.10 Software/Serial****Description**

Software/Serial is a data entry that provides the ability to store software serial number information. Including version, expiry date, name and license key.

The screenshot shows the 'Software' settings window in Password Vault Manager. It features a 'Software' tab and a 'General' sub-tab. The 'General' sub-tab contains the following fields:

- Software:** A text input field.
- Version:** A text input field.
- Build:** A text input field.
- Licensed to:** A text input field with a document icon to its right.
- Licenses:** A large text area with a vertical scrollbar and a document icon to its right.

There is also a 'Details' sub-tab visible next to 'General'.

Data entry - Software settings

## Settings

Name	Encrypted	Description
Software		Software name
Version		Software version number
Registration name		Registered user name
Expiration		License expiration date
Multi licenses		Store multiple license keys or a single key
License		Single key or list of keys

### 4.1.3.11 Wallet

## Description




The Wallet data entry is used to store your wallet information such as driver license or social security number.

## Settings

### *Driver license*



Wallet



Type

Driver license


Driver license


**Wallet settings**

Option	Description
Type	Select the type of wallet entry that you want between: <ul style="list-style-type: none"><li>• <b><i>Driver license</i></b></li><li>• <b><i>Social security number</i></b></li><li>• <b><i>Membership</i></b></li></ul>
Driver license	Enter the driver license

***Social Security Number***

Wallet


 Type

Social security number  

Option	Description
Type	Select the type of wallet entry that you want between: <ul style="list-style-type: none"><li>• <b><i>Driver license</i></b></li><li>• <b><i>Social security number</i></b></li><li>• <b><i>Membership</i></b></li></ul>
Social security number	Enter the social security number

### ***Membership***

Wallet



Type

Membership

Membership

Option	Description
Type	Select the type of wallet entry that you want between: <ul style="list-style-type: none"><li>• <b><i>Driver license</i></b></li><li>• <b><i>Social security number</i></b></li><li>• <b><i>Membership</i></b></li></ul>
Membership	Enter the membership

#### 4.1.3.12 Web

##### Description



The Web data entry type is used for storing web site credential information including user name, & password.

Data entry - Web settings

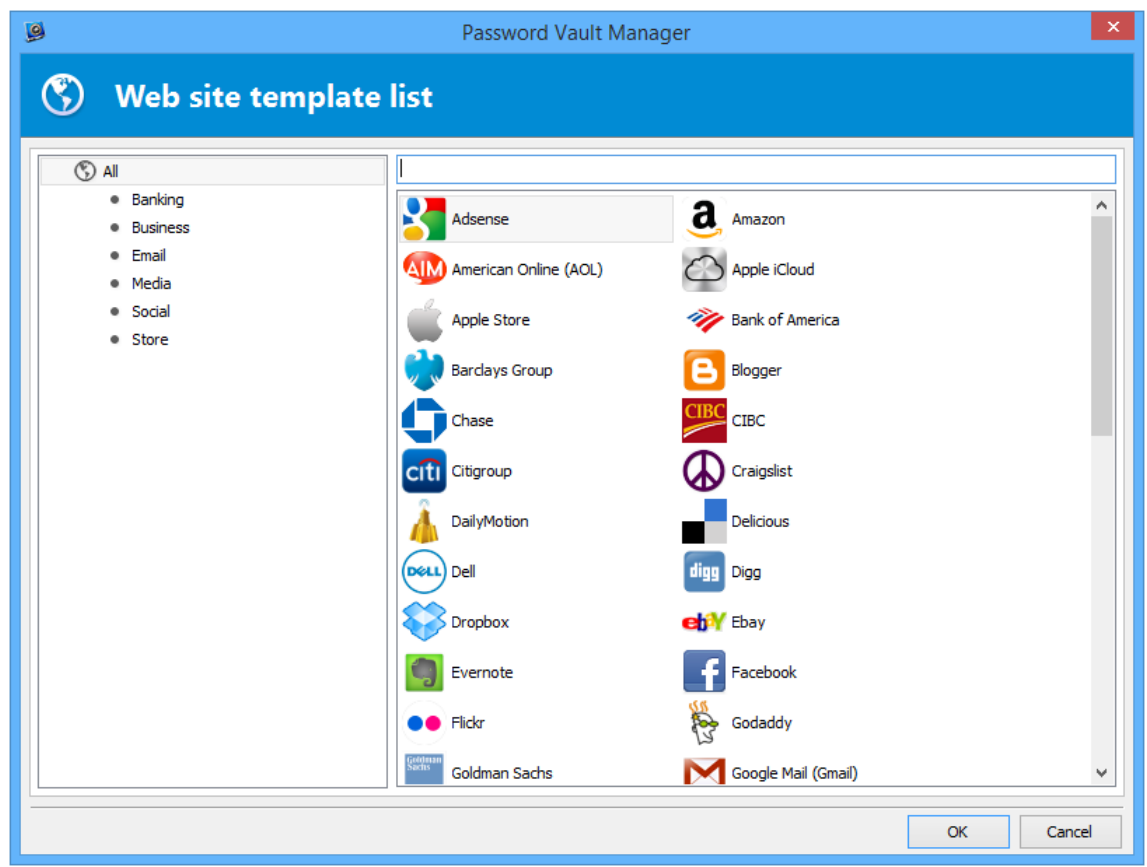
## Settings

Name	Secured	Description
User name		The user name associated to the account
Password	✓	The password associated to the account
Enable web browser extension link		Data entry will be available for the <a href="#">auto fill</a> feature
Password only available to administrator		Must be administrator to be able to view/reveal password the password

## Templates

You can chose from over 55 pre-built templates to help eliminate guess work. For example:

- Facebook
- Hotmail
- LogMeIn
- Paypal
- Twitter



Web Template list

## 4.2 Groups

### 4.2.1 Overview

#### Description

Groups or folders are used to organize your sessions in a logical way. It's possible to create groups and sub groups, which Password Vault Manager will automatically sort alphabetically.

Groups can be created in two different ways:

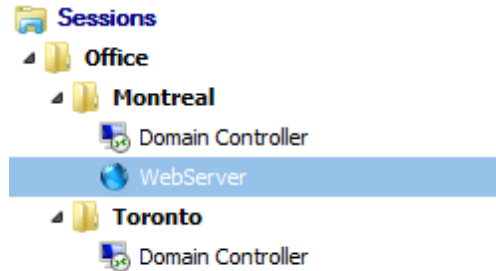
- Via the session properties
- From the session tree view

You can assign a group type to simplify the organization or use variables:

- Company/Site
- Customer/identity
- Database
- Device/Server/Workstation
- Folder

#### Creating Groups via the Entry Settings

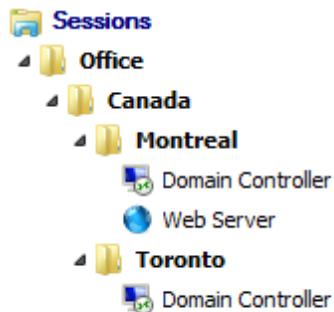
Groups can be specified in the session properties. Simply fill this field with your desired group name, and Password Vault Manager will generate the corresponding tree structure. Use the backslash ( \ ) to create a sub group.



#### Basic group structure

For example, "Office\Canada\Montreal" will create three nodes in the tree:

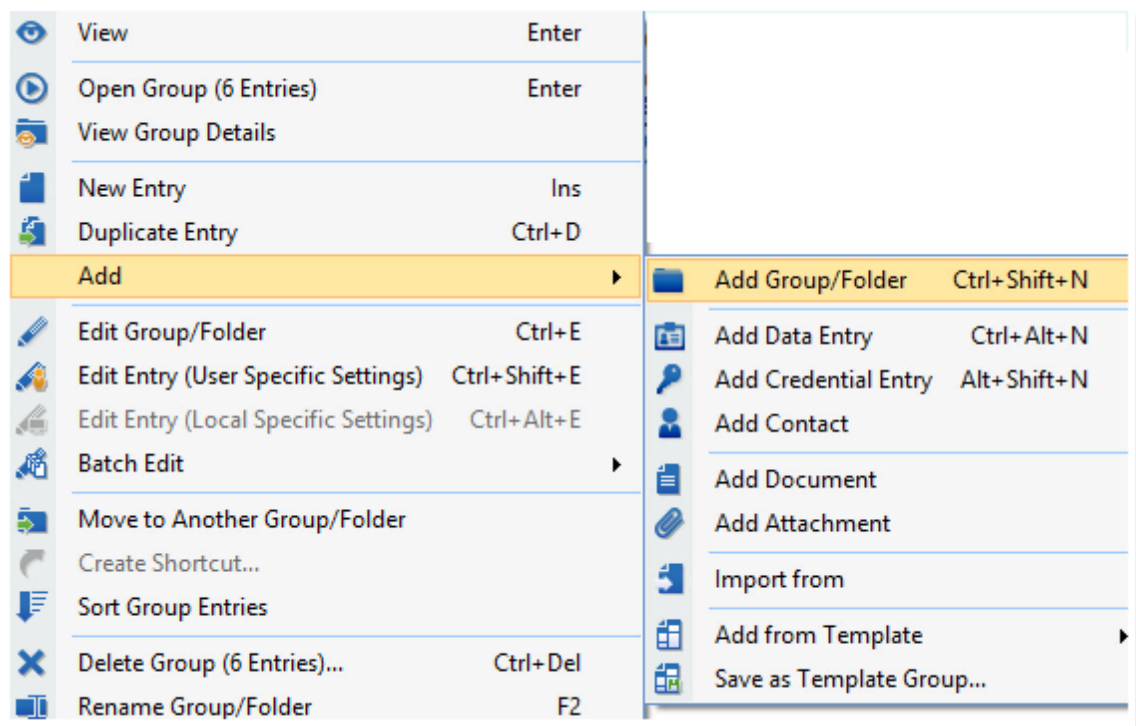
- Office
- Canada
- Montreal



#### Modified group structure with a new node

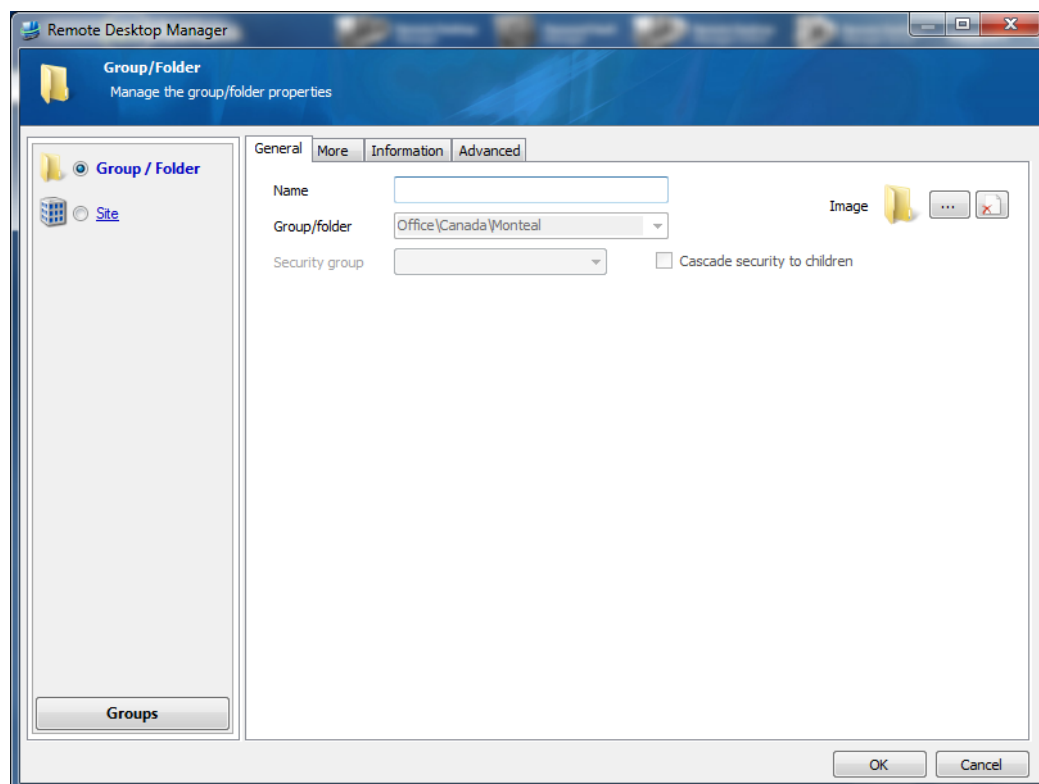
### Creating Groups from the Tree View

By right clicking the root node of a group or an existing session, a context menu appears allowing you to create a new group.



**Add group from the session context menu**

The "Add Group" dialog box will then prompt you to enter the name of the group, and choose its parent group.



### Group edition dialog

Once a group is created, you can add a session by using the menu, or by dragging its node directly to the content of the group.

## 4.2.2 Types

### 4.2.2.1 Company

#### Description



This entry is used to organize a 'Company' group.

#### Settings

The screenshot shows a 'Details' tab with a light blue border. Inside, there's a white area with a light blue border. On the left, there's a small icon of two people. To the right of this icon are three labels: 'User name', 'Domain', and 'Password'. Each label is followed by a text input field. To the right of the 'Password' field are two small icons: an eye (for visibility) and a key (for keychain selection).

Company group tab

Enter the user name, domain and password if you wish for children entries to inherit them.

### 4.2.2.2 Customer

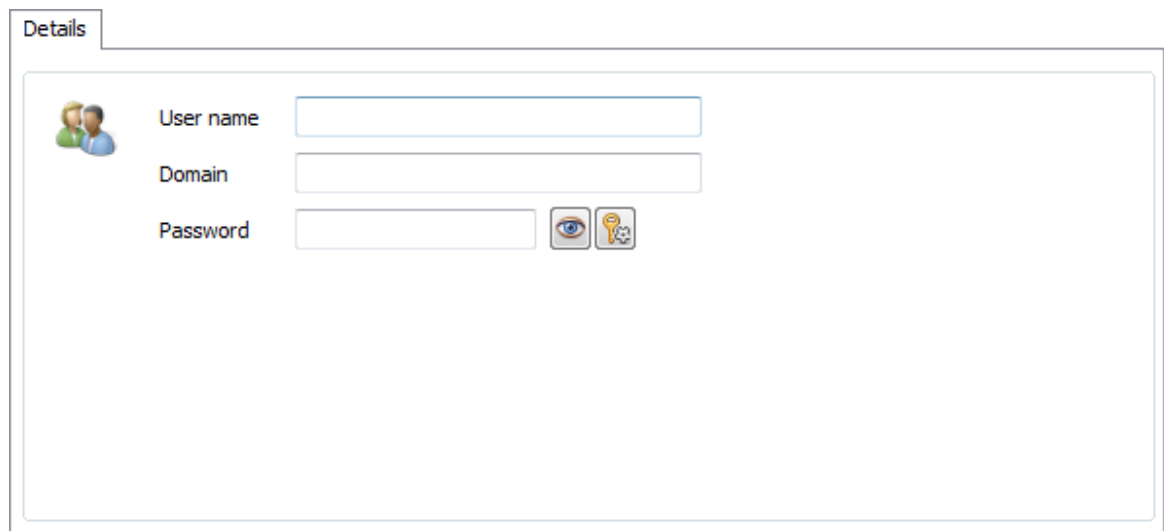
#### Description



This entry is used to organize a 'Customer' group.

#### Settings





The 'Details' tab is active. It contains three input fields: 'User name', 'Domain', and 'Password'. To the left of these fields is a small icon of two people. To the right of the 'Password' field are two icons: an eye and a key.

**Customer group tab**

Enter the user name, domain and password if you wish for children entries to inherit them.

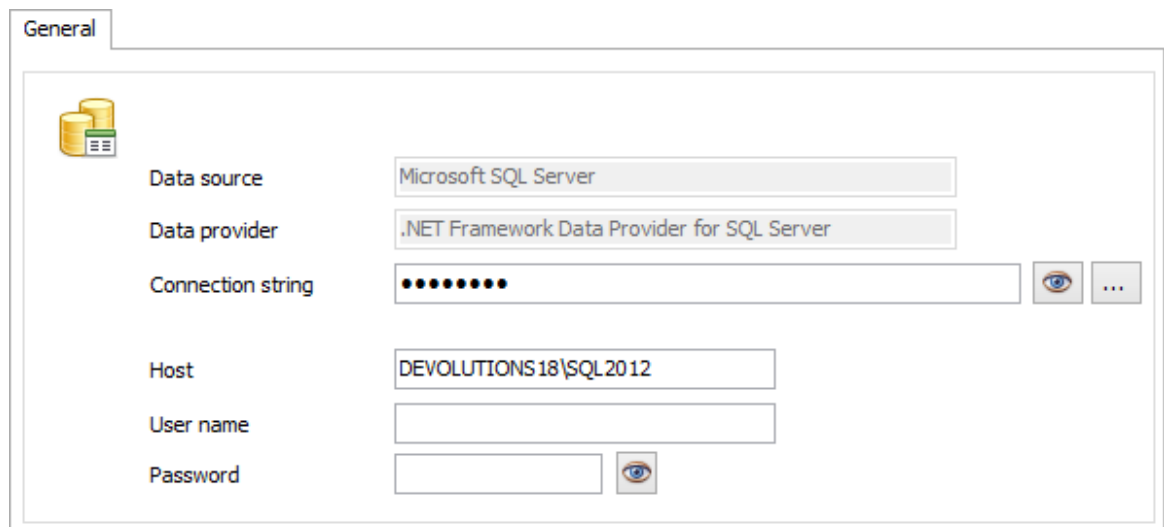
#### 4.2.2.3 Database

##### Description



This entry is used to organize a 'Database' group.

##### Settings



The 'General' tab is active. It contains several input fields and buttons: 'Data source' (Microsoft SQL Server), 'Data provider' (.NET Framework Data Provider for SQL Server), 'Connection string' (a field with dots and an eye icon), 'Host' (DEVOLUTIONS18\SQL2012), 'User name', and 'Password' (with an eye icon). To the left of these fields is a small icon of a database.

**Database group tab**

Enter the connection information if you wish the child entries to inherit from it. Press the ellipsis button to be able to select the data source and data provider. This will generate the connection string with the information you enter in the dialog.

#### 4.2.2.4 Device






##### Description



This entry is used to organize a 'Device' group.

##### Settings

Details

	Computer	<input type="text"/>	
	IP	<input type="text"/>	
	User name	<input type="text"/>	
	Domain	<input type="text"/>	
	Password	<input type="password"/>	 

Device group tab

Use the ellipsis button to select from a list of discoverable computers or enter the name or IP address manually. Enter the user name, domain and password if you wish for children entries to inherit them.

#### 4.2.2.5 Group/Folder


##### Description



This entry is used to organize the content in group or folder



##### Settings

Details



User name

Domain

Password   

**Group/Folder group tab**

Enter the user name, domain and password if you wish for children entries to inherit them.

#### 4.2.2.6 Identity


##### Description



This entry is used to organize a 'Identity' group.



##### Settings

Details



User name

Domain

Password   

**Identity group tab**

Enter the user name, domain and password if you wish for children entries to inherit them.

#### 4.2.2.7 Server






##### Description



This entry is used to organize a 'Server' group.

##### Settings

Details

	Computer	<input type="text"/>	
	IP	<input type="text"/>	
	User name	<input type="text"/>	
	Domain	<input type="text"/>	
	Password	<input type="password"/>	 

Server group tab

Use the ellipsis button to select from a list of discoverable computers or enter the name or IP address manually. Enter the user name, domain and password if you wish for children entries to inherit them.

#### 4.2.2.8 Site

##### Description



This entry is used to organize a 'Site' group.



##### Settings

Details



User name

Domain

Password   

Site group tab

Enter the user name, domain and password if you wish for children entries to inherit them.

#### 4.2.2.9 Workstation


##### Description




This entry is used to organize a 'Workstation' group.


##### Settings

Details





Computer  

IP

User name

Domain

Password   

Workstation group tab

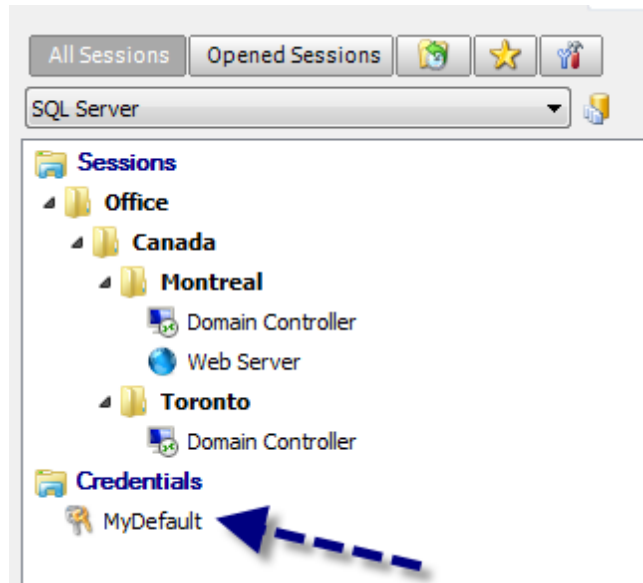
Use the ellipsis button to select from a list of discoverable computers or enter the name or IP address manually. Enter the user name, domain and password if you wish for children entries to inherit them.

## 4.3 Credentials

### 4.3.1 Overview

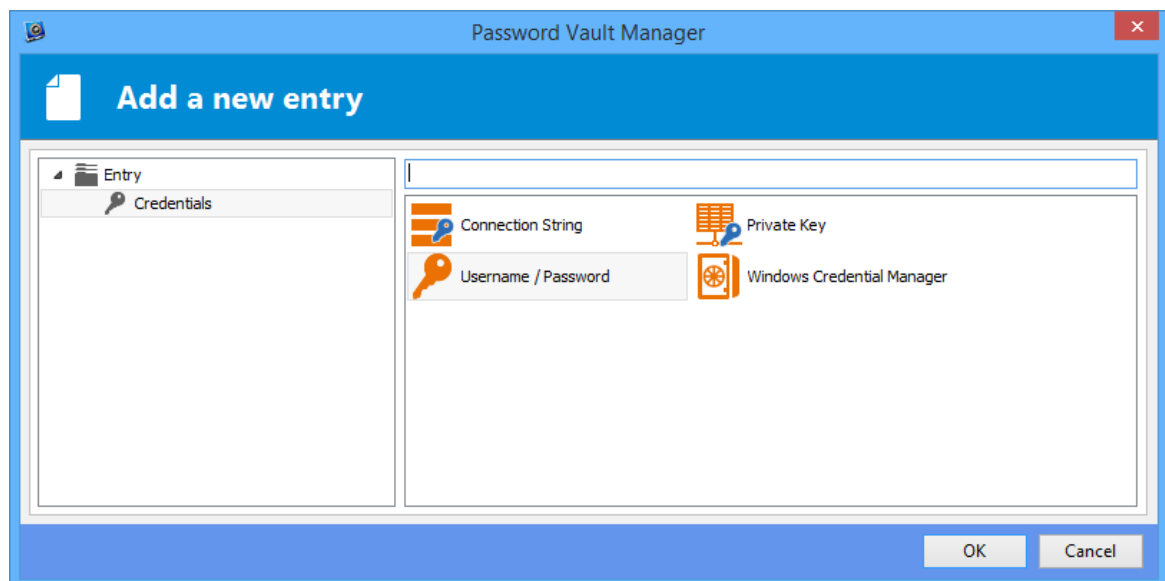
#### Description

The credential repository is available in the Enterprise edition and allows you to set multiple sessions to a specific set of credential. This simplifies management by forcing users to modify their credentials in one place. The list is visible in the tree view under the session list.



Credentials node from the tree view

To create an entry, use the session's context menu and select **Add -> Credential Repository**.



Credential Entry dialog

## 4.3.2 Types

### 4.3.2.1 Connection String

#### Description



This entry is used to define and configure a 'Connection String' credential entry. Connection string credential entries are exactly the same as a [Database Group](#) with the exception that they are not limited by the inheritance hierarchy of groups & sessions.

#### Settings

### 4.3.2.2 Username/Password

#### Description



This entry is used to define and configure a 'Username/Password' credential entry. Provide the username, domain and password to save the credential. This is the default credential type.

#### Settings

Credential Username/Password

#### 4.3.2.3 Windows Credential Manager

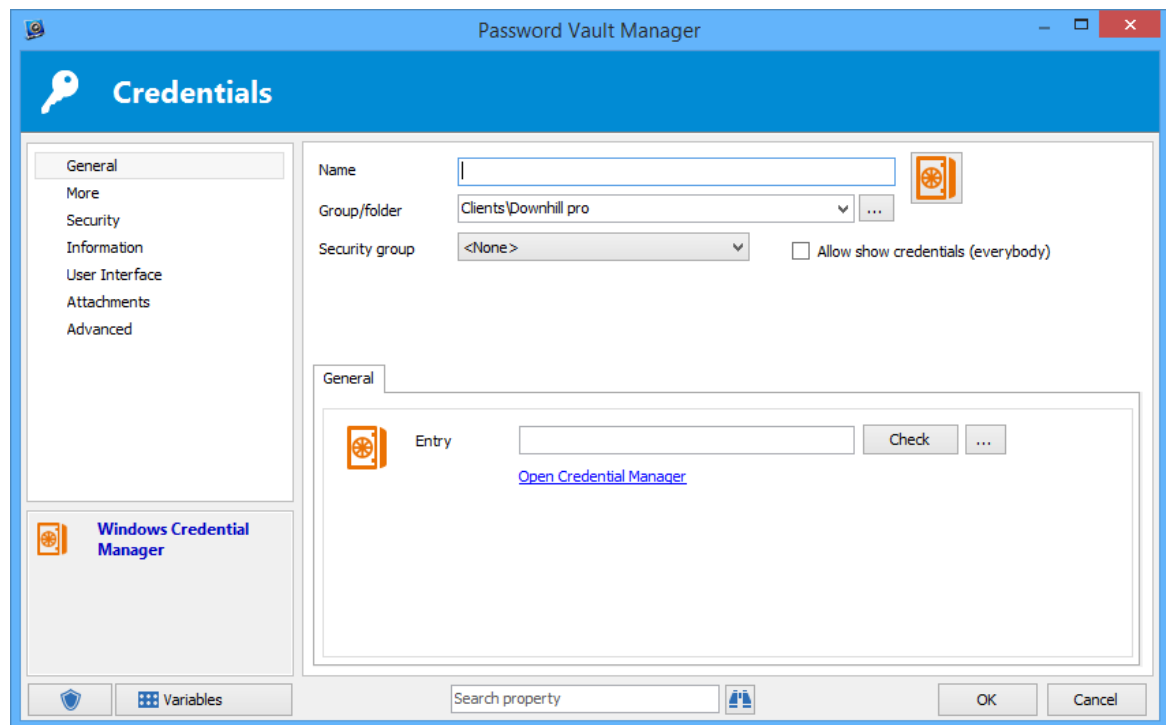
##### Description



This entry is used to define and configure a 'Windows Credential Manager' credential entry. Use an existing credential entry from the Windows Credential Manager (also called Windows vault).

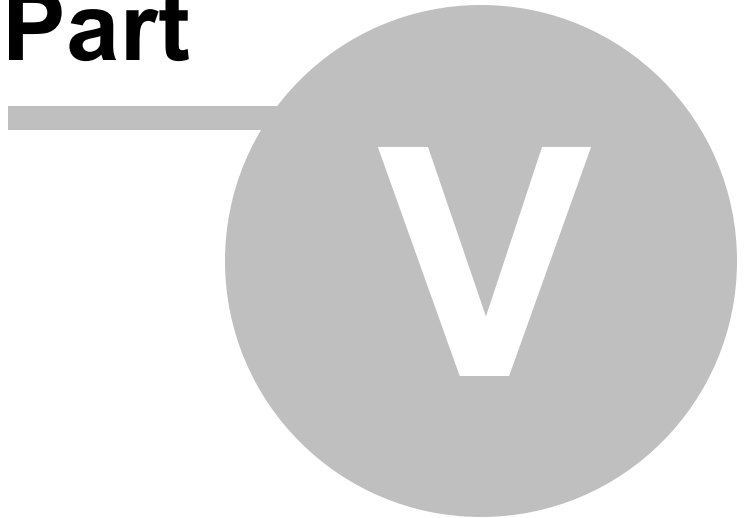
##### Settings





# Features

**Part**



## 5 Features

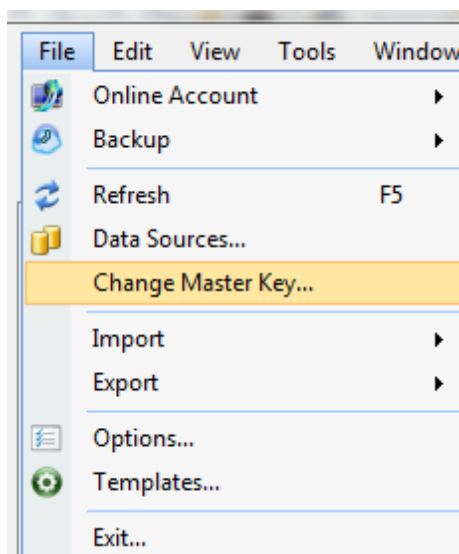
### 5.1 File

#### 5.1.1 Master Key

##### Description

You can apply a Master Key or Encryption key to these types of data source:

- Xml
- Dropbox



Change Master Key menu

It is generally a good idea to apply a Master Key to your XML or DropBox Data Sources, as it adds another layer of security protecting your Remote Sessions. It is highly advisable to implement the Master Key functionality of Password Vault Manager if you're using RDM in a portable environment (i.e. USB Flash Drive, USB Hard Drive), or if the Data Source is the portable portion of the application.

The use of the Master Key function will stop unauthorized users from being able to easily see/access the stored Sessions within your Data Source.

#### 5.1.2 Offline Mode

##### Description

The offline mode allows you to connect to a read-only copy of the data source when the live database is unavailable. It can be used when the VPN connection is down, or when a user is working from a disconnected network.

This feature is only available with the SQL Server data source, and it must be enabled in the settings. Password Vault Manager will automatically switch to offline mode when the application is unable to reach the data source.

You can also manually activate the offline mode by using the menu **File -> Go Offline**. You can then reconnect to the live database when the connection is back online by using the menu **File > Go Online**.

### 5.1.3 Online Services

#### 5.1.3.1 Backup

##### Description

The Online Backup Service (available via subscription) allows you to automatically save your sessions safely in an online storage space, and restore them in the event of problems.

The Online Backup Service is the simple, reliable and cost-effective way to avoid losing all of your invaluable data and settings due to human error or equipment failure.

Available for both the Standard and Enterprise edition, this affordable backup solution works with any XML and Microsoft Access data source in Password Vault Manager.



The PRO subscription adds event history to the BASIC subscription. For current pricing please visit

<http://remotedesktopmanager.com/remotedesktopmanager/Home/OnlineBackup>

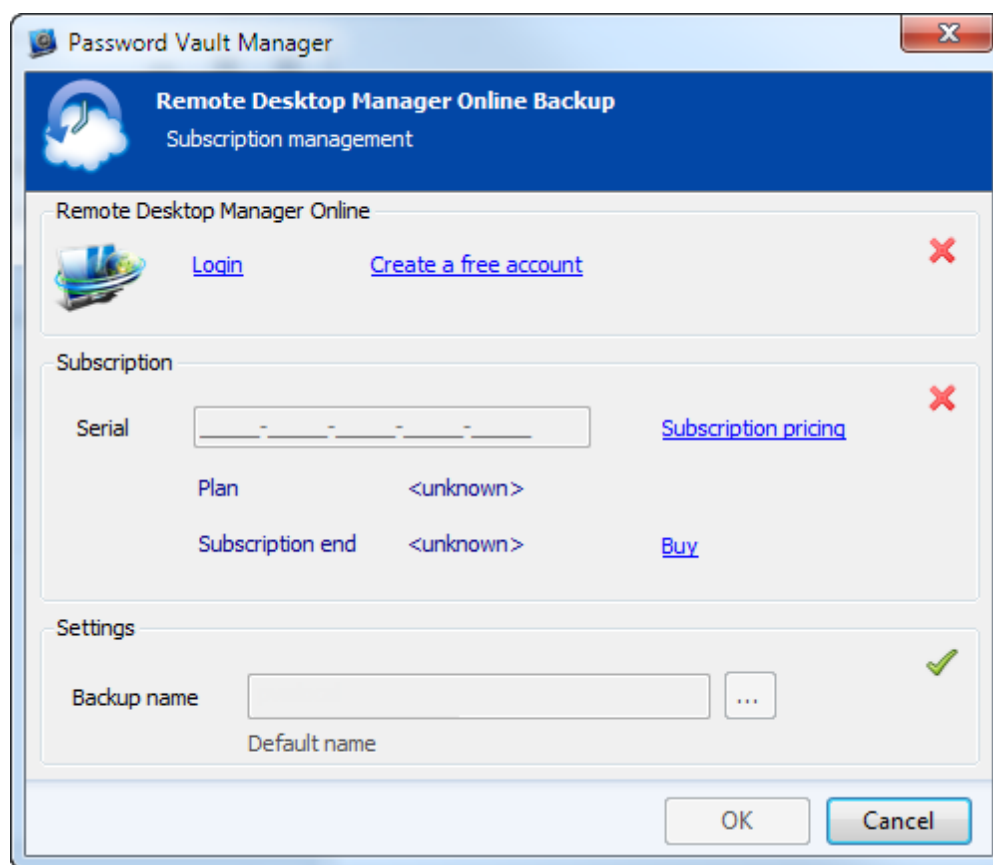
##### Configuration Instruction

1. On Password Vault Manager's main screen, on the bottom right corner, click on the backup logo to configure the automatic backup.



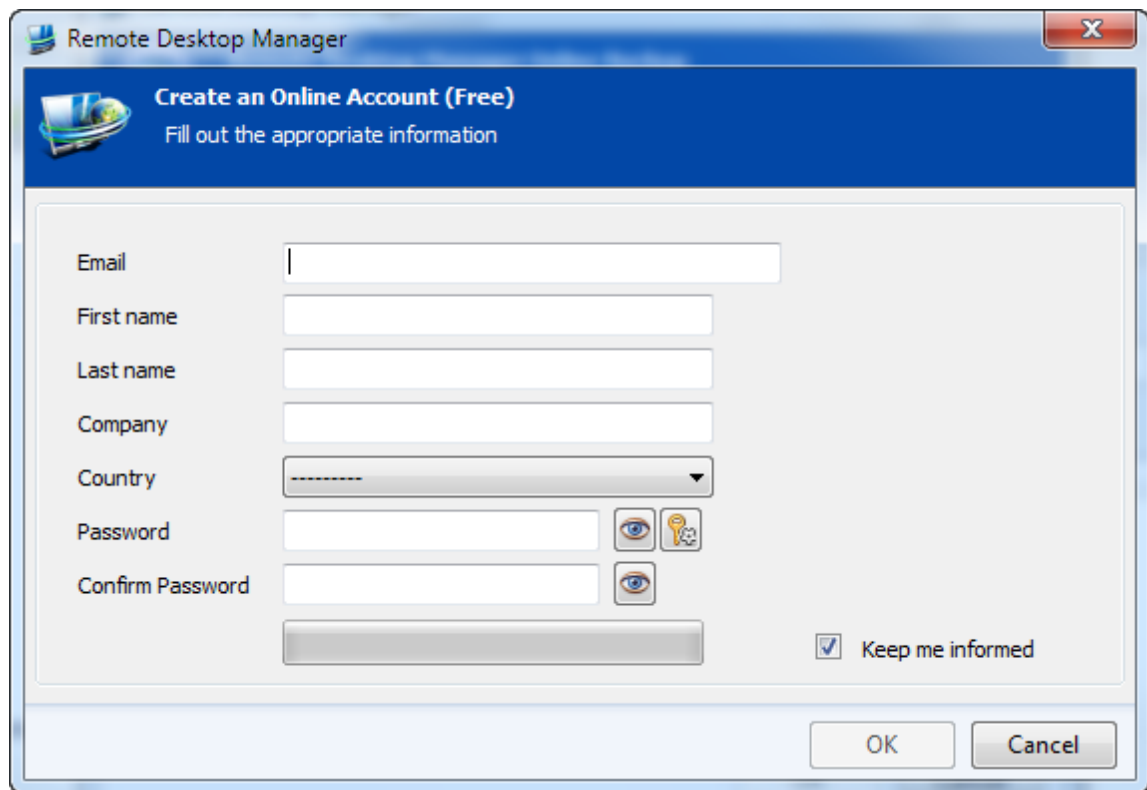
Backup logo

The following form will appear



Remote Desktop Manager Online (RDMO) information

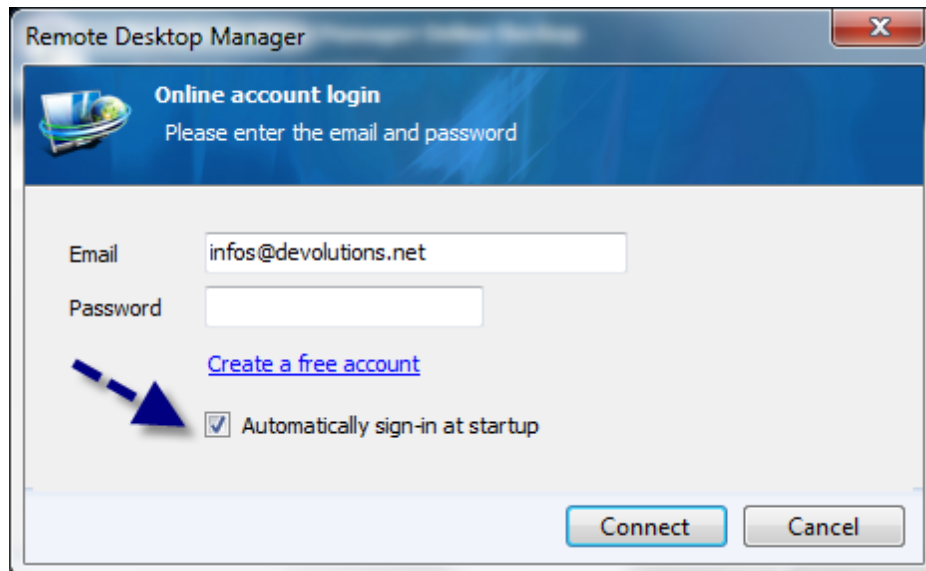
2. If you don't have a RDMO account, select **Create a free account** and fill in the information.



The screenshot shows the 'Remote Desktop Manager' window with the 'Create an Online Account (Free)' dialog box open. The dialog box has a blue header with the title and a sub-header 'Fill out the appropriate information'. Below the header, there are several input fields: 'Email', 'First name', 'Last name', 'Company', 'Country' (a dropdown menu), 'Password', and 'Confirm Password'. To the right of the 'Password' and 'Confirm Password' fields are icons for showing/hiding the password and a key icon. At the bottom right of the dialog box is a checkbox labeled 'Keep me informed' which is checked. At the very bottom are 'OK' and 'Cancel' buttons.

RDMO Account creation

3. Login with your Remote Desktop Manager Online account and check "Automatically sign-in at startup" so that the backup will be automatically enabled at your next startup.



The screenshot shows the 'Remote Desktop Manager' window with the 'Online account login' dialog box open. The dialog box has a blue header with the title and a sub-header 'Please enter the email and password'. Below the header, there are two input fields: 'Email' (containing 'infos@devolutions.net') and 'Password'. Below the 'Email' field is a blue arrow icon pointing to a blue triangle. Below the 'Password' field is a blue link labeled 'Create a free account'. At the bottom left is a checkbox labeled 'Automatically sign-in at startup' which is checked. At the bottom right are 'Connect' and 'Cancel' buttons.

Account login

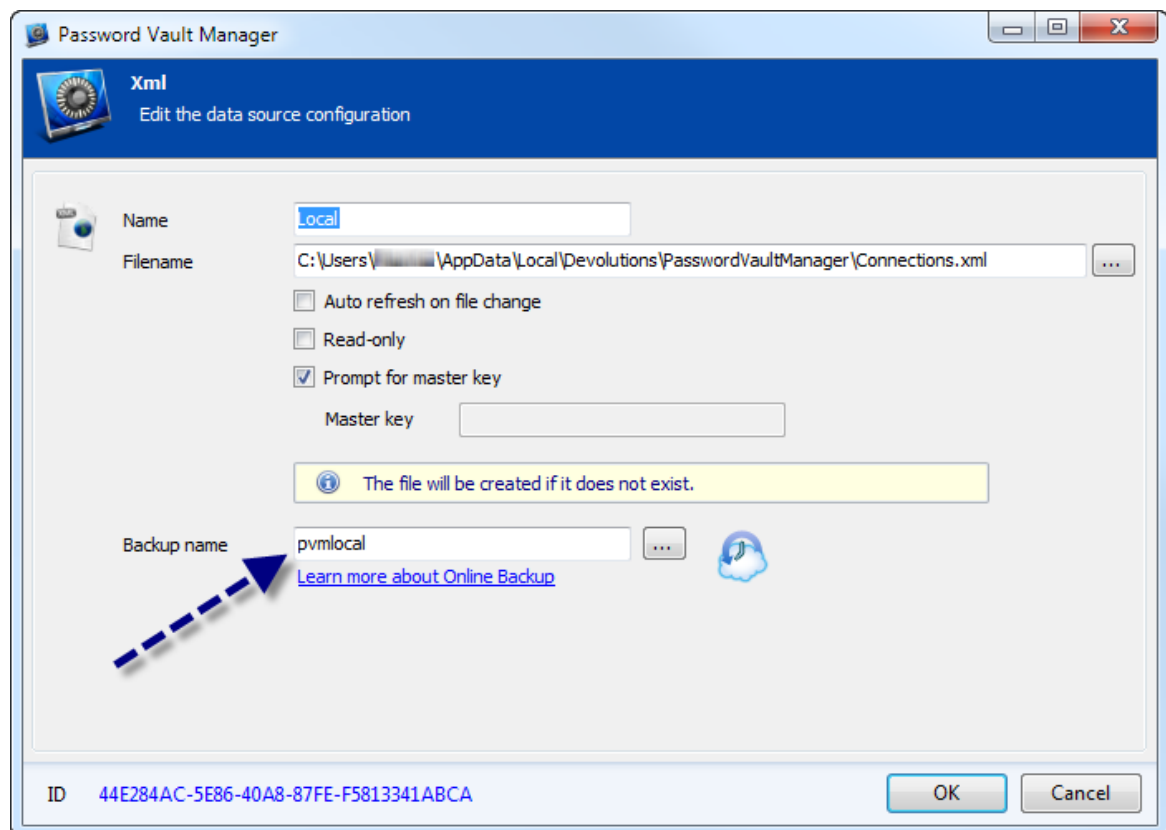


For forgotten passwords or locked accounts you must go online to use the forgot password feature. Please visit <https://online.remotedesktopmanager.com/> to proceed.

4. Enter the serial for your subscription. You can click on **Buy** in order to purchase or you can request a trial on <http://remotedesktopmanager.com/remotedesktopmanager/Home/OnlineBackup>.
5. You will need to specify a unique backup name, for each of your desired data source (Xml or Access), which will be used to backup and restore the data source. Edit your data source settings and fill-in the "Backup Name" field.



You must perform this for all your XML, MS Access and SQLite data sources in order to be fully protected!



Backup Name

6. Once the backup name has been set, the Online Backup logo will display a green check mark showing that the backup is now enabled.



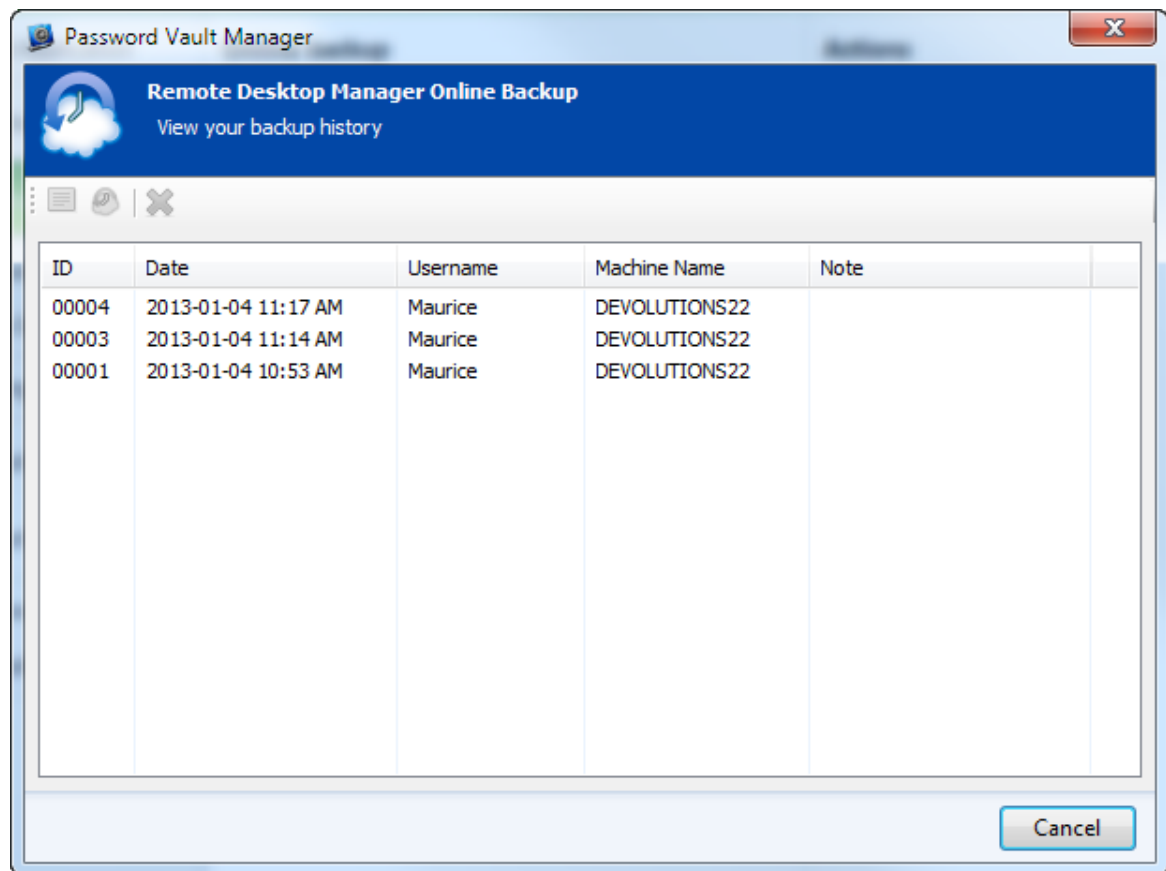
Online Backup logo



The automatic backup is executed in background, 30 seconds after each session modification (add, edit, delete).

## Restore Instruction

1. To restore a data source from a backup, select it as the current data source.
2. Go to File > Backup > View History to display the list of your backups.
3. Select one from all the available restore points, this will enable the action buttons at the top.
4. Press on the second button to restore. Alternatively Right-click on your chosen backup to display the restore popup menu.



Backup history

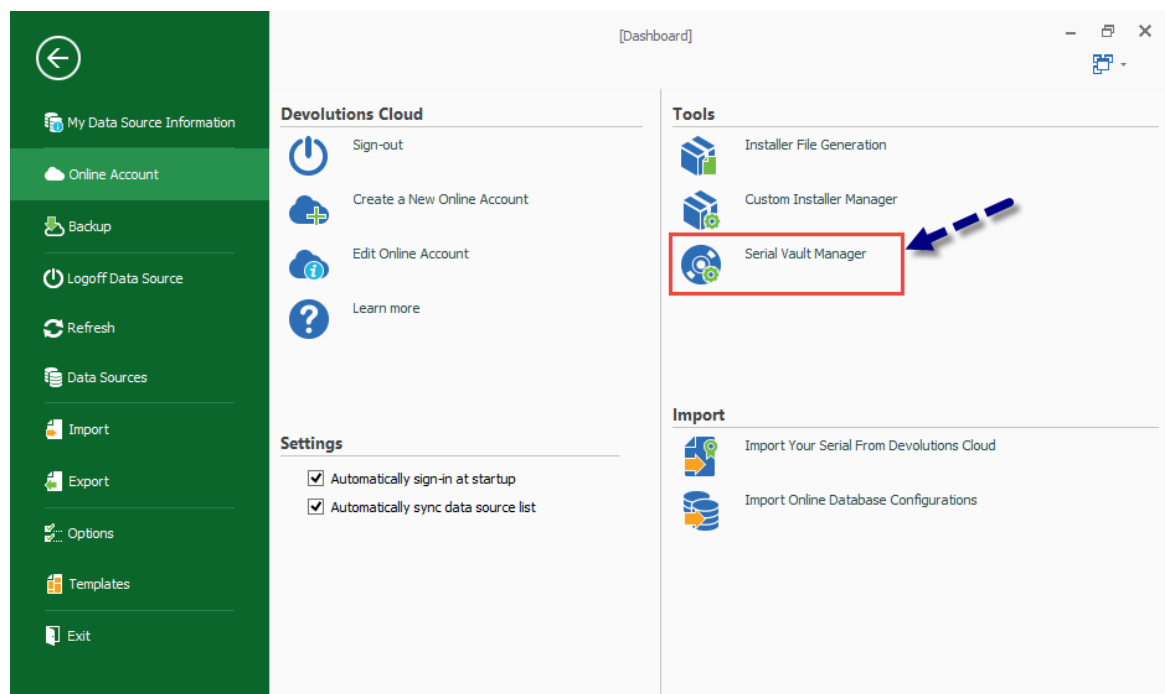
### 5.1.3.2 Serial Vault

## Description

The serial vault is part of the Remote Desktop Manager Online subscription. It allows you to store Serial numbers for software licenses that you own. The vault is also available when you log in the Remote Desktop Manager Online site.

Select **File->Online account**, you will see the Serial Vault Manager link.

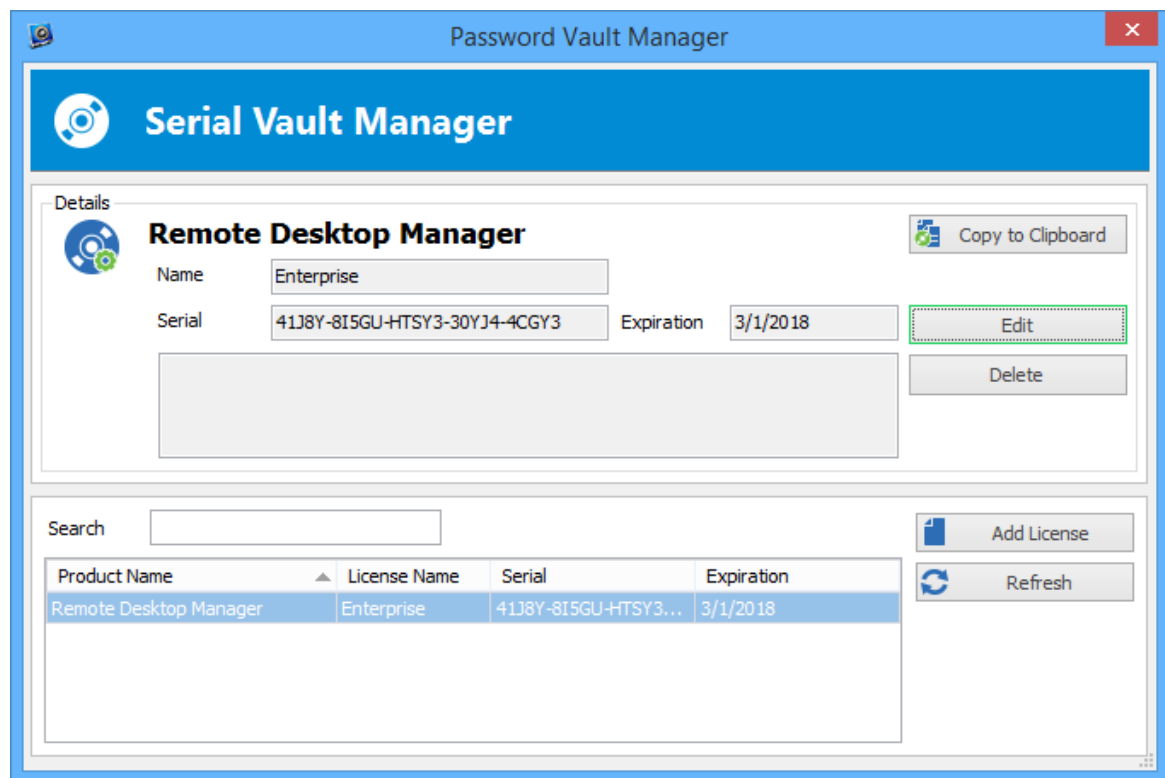




Online account access

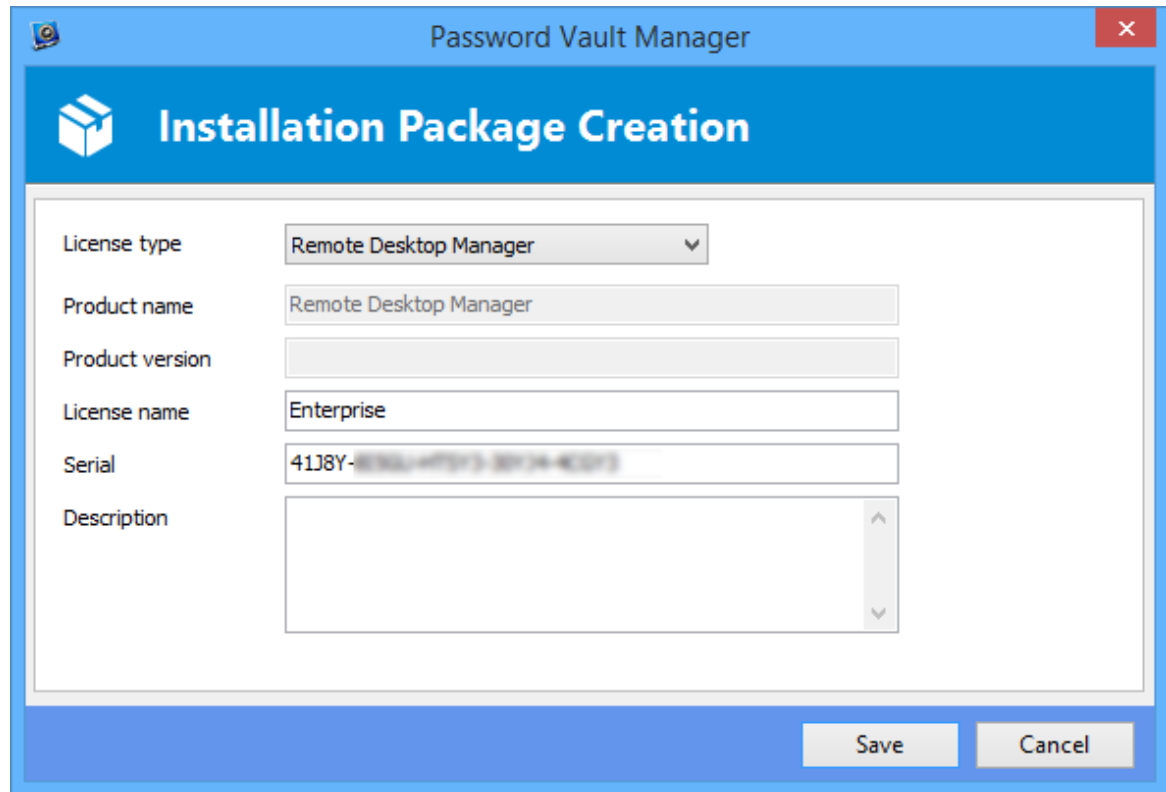
## Workflow

Clicking on Serial Vault Manager will display this dialog



Serial Vault Manager

Edit will allow you to edit the serial entry. For your convenience, the copy to clipboard button can be used to quickly be able to paste the serial in a registration window. You can also delete entries or create new ones.

The image shows a Windows-style dialog box titled "Password Vault Manager" with a close button (X) in the top right corner. The main content area has a blue header with a cube icon and the text "Installation Package Creation". Below this, there are several input fields: "License type" is a dropdown menu currently showing "Remote Desktop Manager"; "Product name" is a text box containing "Remote Desktop Manager"; "Product version" is an empty text box; "License name" is a text box containing "Enterprise"; "Serial" is a text box containing "41J8Y-10000-47573-30124-40013"; and "Description" is a large empty text area with a vertical scrollbar. At the bottom right of the dialog are two buttons: "Save" and "Cancel".

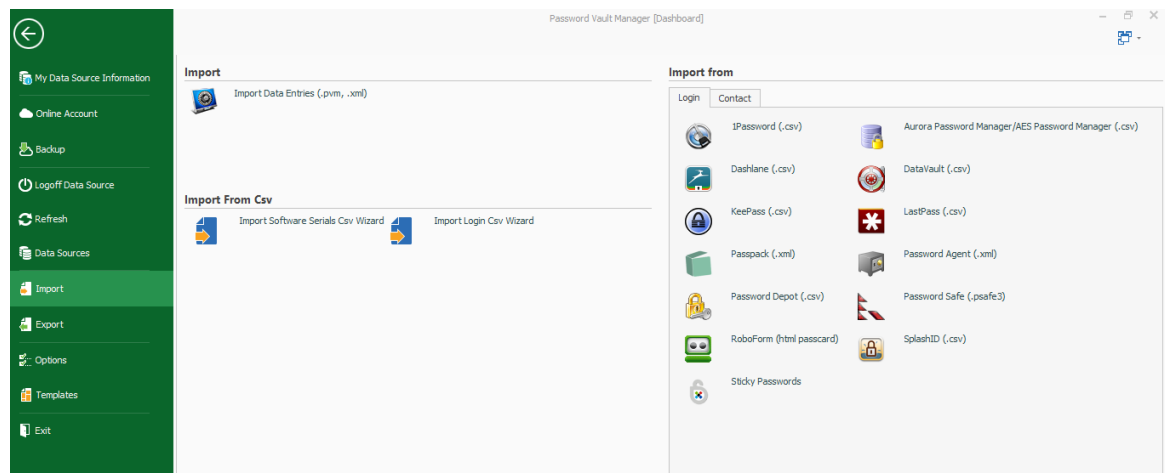
Add license dialog

Selecting "Other" as the License type will activate all controls so you can enter the information as you see fit.

## 5.1.4 Import

### Description

Password Vault Manager can import from various sources. It can obviously use its own export files, but also many other applications data. If your preferred application is not supported natively, an import wizard is provided to allow you to perform a massive import rapidly.



Import Logins/Passwords menus

## Import Logins

You can also your logins from an existing application. Your configuration file data must not be encrypted in order to allow Password Vault Manager to parse the content.

The list of the supported applications includes:

- RoyalTS (<http://www.code4ward.net/main/>)
- mRemtote (<http://www.mremote.org/wiki/>)
- visionapp Remote Desktop (<http://www.visionapp.com/germany/products/software/visionapp-remote-desktop.html>)
- Terminals (<http://terminals.codeplex.com/>)
- Microsoft Remote Connection Manager ([download](#))
- Boztech VNCSan (add-on)
- WinSCP (add-on)
- Filezilla (add-on)

### Using the Import Wizard

Please see the [Import Login Wizard](#) topic.

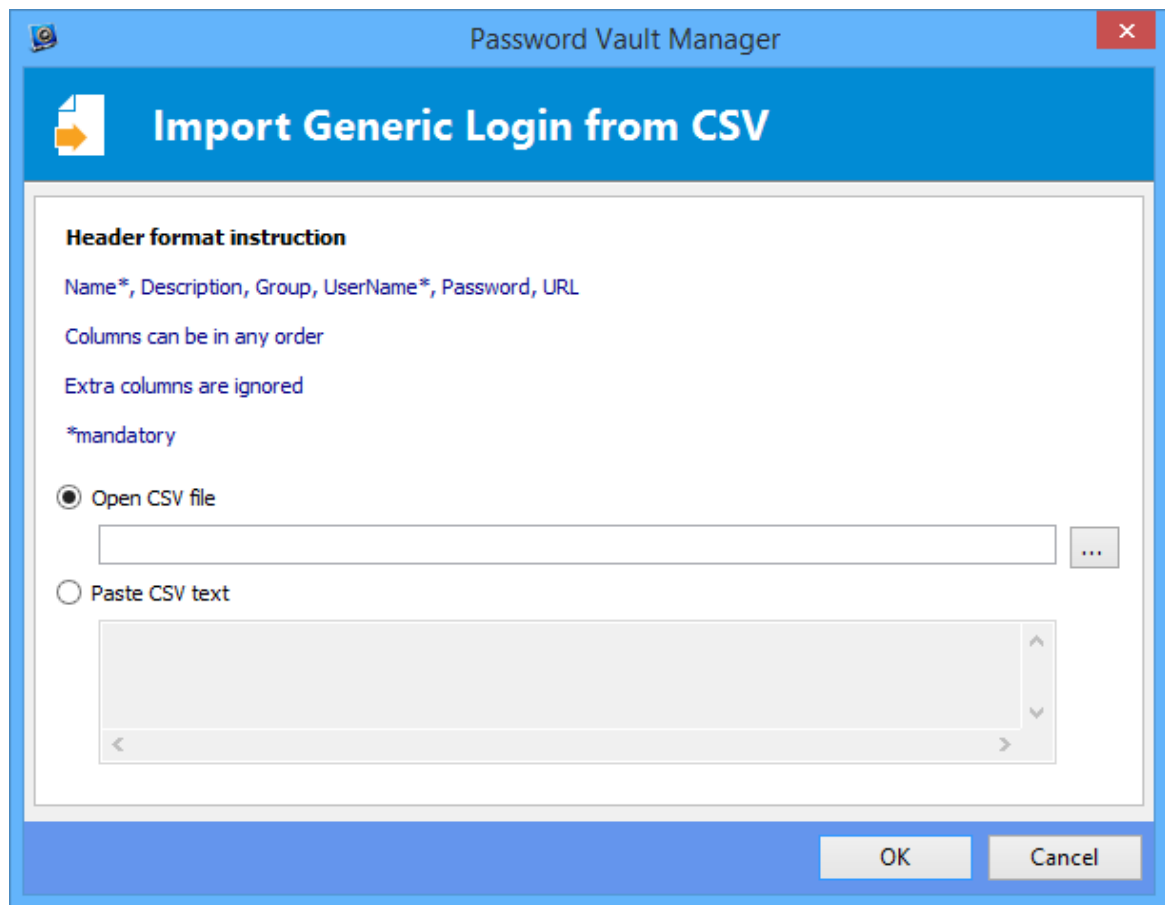
## Import Data Entries

When your file was generated using Password Vault Manager and its native format, it has the .pvm extension. Simply select the appropriate **Import Data Entry** menu to perform the operation.

### 5.1.4.1 Import Login Wizard

#### Description

When your application data file format is not natively supported by Password Vault Manager, you can use a plain csv file to create your data entries. This would be extremely useful when you can restructure the unsupported data file into a compatible csv file.



Import Login Wizard

## Prerequisites

Our csv format has the following pre-requisites:

- The column separator must be a comma
- The string escape character is the double quote. You must use this if one of your fields contain commas.
- The following columns are mandatory : Name, UserName.
- The following columns are optional but imported when present : Description, Group, Password and URL.

## Notes

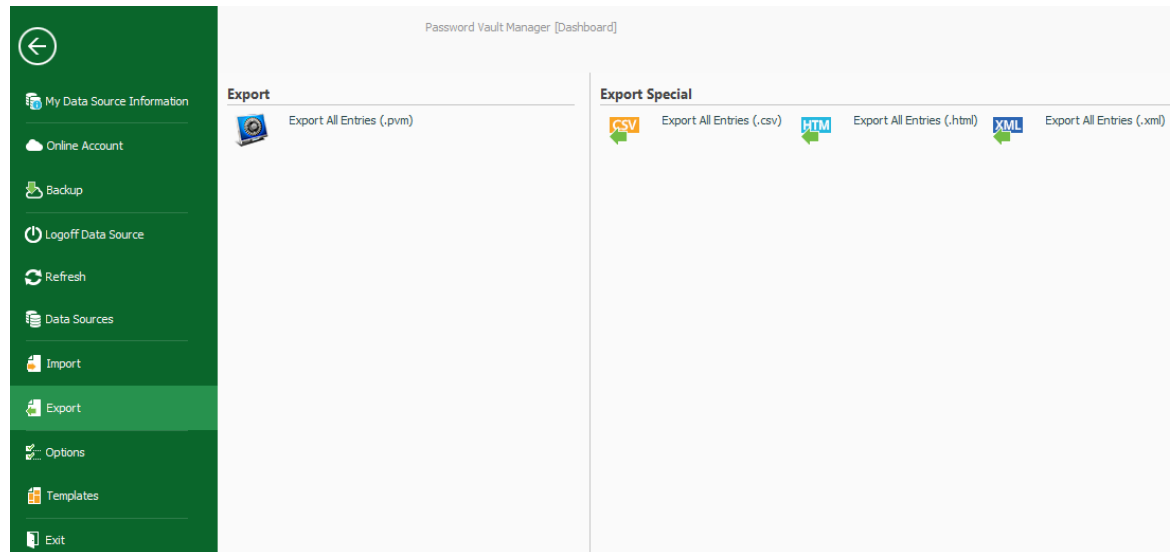
- All other columns are simply ignored.
- The columns are accessed by name, therefore the order is unimportant.
- Instead of using a file, you can paste the content directly in the form.

## 5.1.5 Export

### 5.1.5.1 Overview

#### Description

Password Vault Manager supports many export options. Below is a list of export options.



File -> Export

#### Overview

##### Export

This section uses the Password Vault Manager native file format (pvm)

- Export All Data Entry List
- Export All Data Entry List (Include Credentials)
- Export All Host List (.csv)
- <sup>1</sup>Export Selection List
- <sup>1</sup>Export Selection (Include Credentials) (Ctrl+Alt+E)

##### Export data entries

- Export All Data Entries (.csv)
- Export All Data Entries (.html)
- Export All Data Entries (.xml)
- <sup>1</sup>Export Selected Data Entry (.csv)
- <sup>1</sup>Export Selected Data Entry (.html)
- <sup>1</sup>Export Selected Data Entry (.xml)

#### Security

When using an Advanced Data Source, export capabilities can be disabled via security policies at the data source level (no one can export) or at a user level (particular users can't export). See Data Sources

for more information.

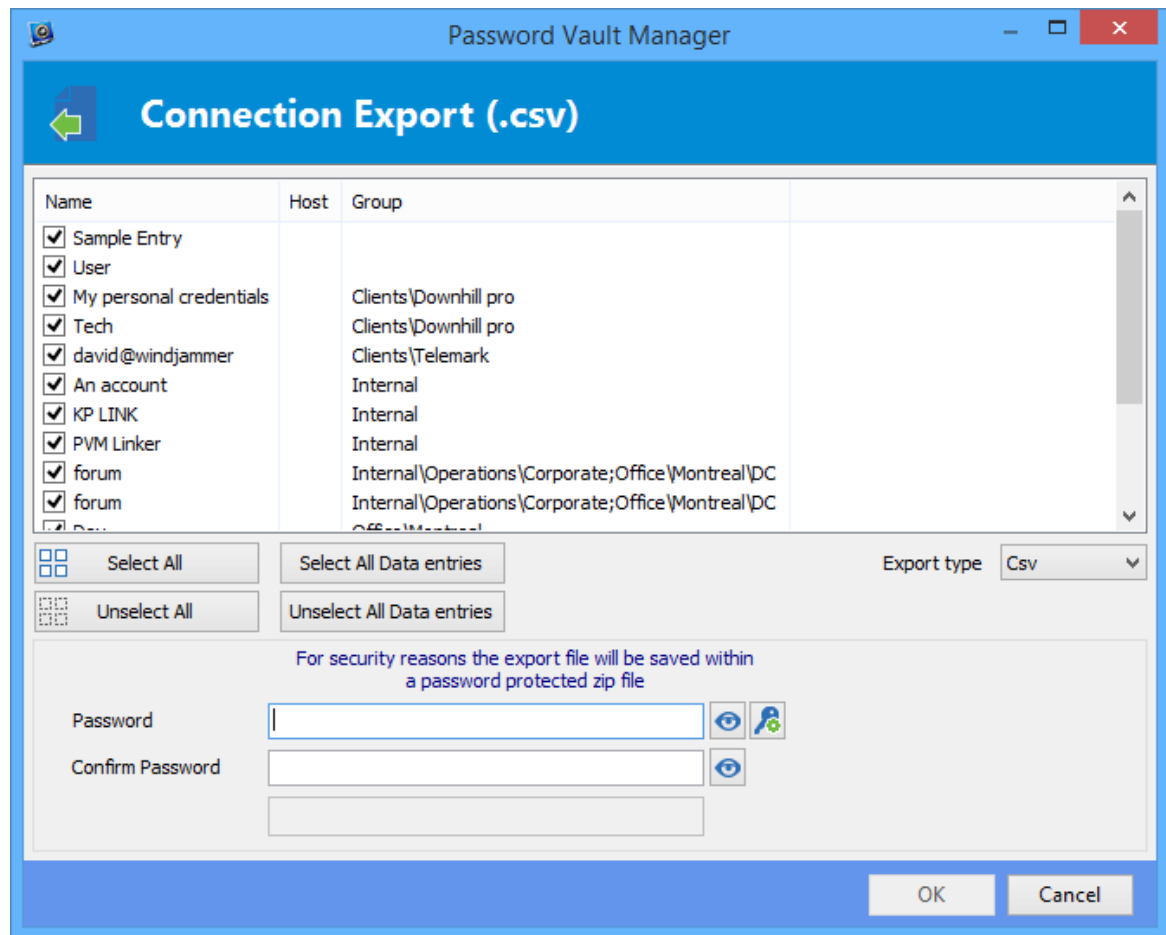
## Export All Session List

Exports all session in xml format within a .pvm file that can now be imported into any PVM install. Good for backups but doesn't include credentials (username, domain & password). All data is in clear text.

## Export All Session List (Include Credentials)

Same as Export All Session List but includes credentials. All data is in clear text.

## Export All Data Entries (.csv)



### Zip file password

Export all data entries within .csv format file. For security reasons the .csv file will be contained within a password encrypted zip file. Zip File Security isn't bullet proof but better than nothing. Please note that the csv columns will vary depending on data entry types being exported.

## Export All Date Entries (.html)

Exports all data entries within a AES-256 to encrypt self contained html file. See [Export Html Encrypted](#) for more information.

## Export All Date Entries (.xml)

Much like the Export All Date Entries (.csv) export format the .html file will be contained within a password protected zip file.

<sup>1</sup> - only available via Right-Click menu of the tree view or hot key.

### 5.1.5.2 Encrypted Html

#### Overview

Export Html Encrypted was design to allow for simple & secure exports of data entry type sessions. It allows for an .html export of the session information while using symmetric encryption (AES-256) to encrypt sensitive information such as passwords. The file is an ultra portable self contained html file that requires no external script files or installs. As long as you have a web browser with JavaScript enabled you can get to your encrypted data.

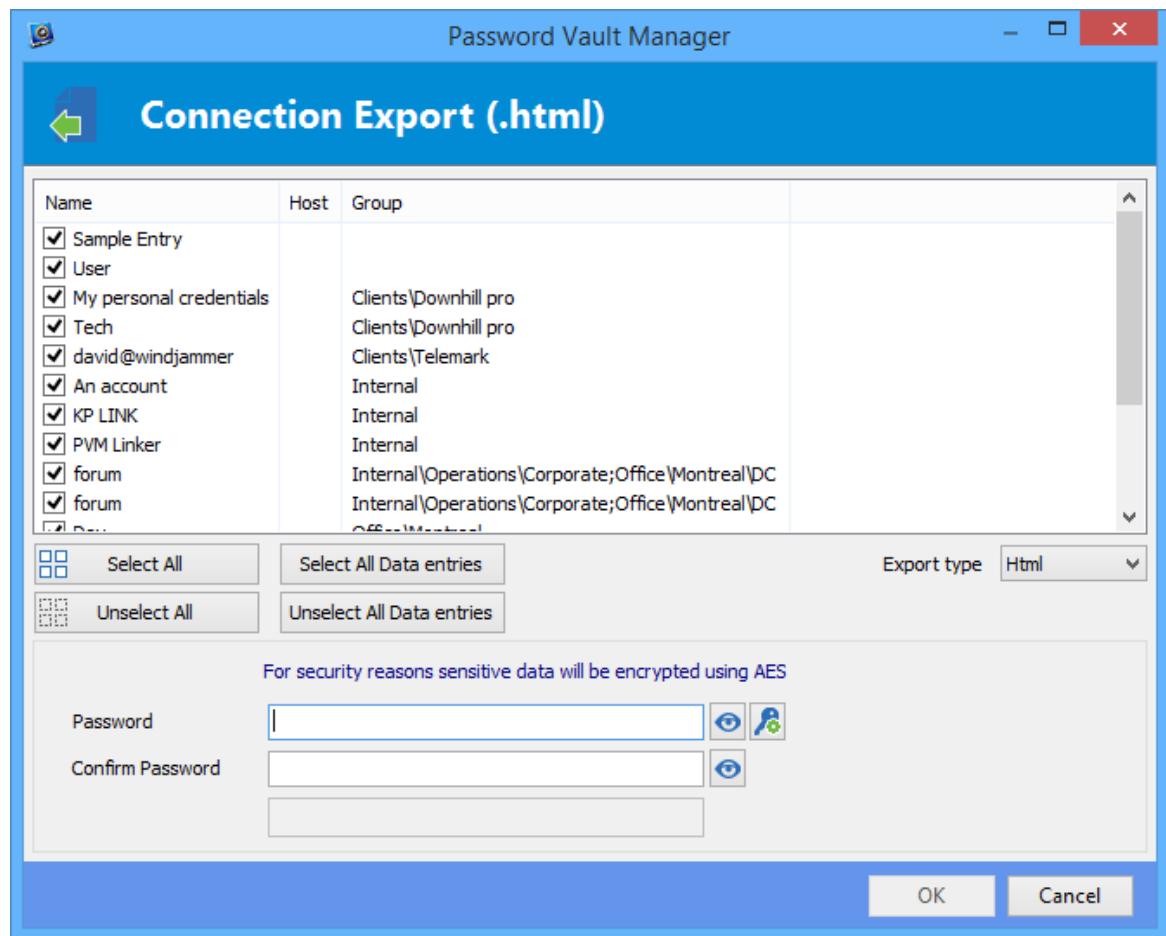
#### Why?

With a secure encrypted document you can freely send the information via email or any other protocol without compromising the sensitive data. Use the export as means of sharing or as a backup for sensitive information.

#### How To





Select the sessions to export or export all data entries. Right-click **Import/Export -> Export Data Entry -> Export Data Entry (.html)** or use **File -> Export -> Export All Date Entries (.html)**. You will be prompted for a password for the symmetric encryption of sensitive information. Select the file name for the new document. Once the export complete the file will open in your default browser.

Note: Make sure you don't forget the password as you will not be able to decrypt the data without it.









Password for symmetric encryption



Name	Safe Text
Group/folder	HTML Export
Url	<a href="http://www.somesite.com">http://www.somesite.com</a>
 User name	random@domain.com
Password	***** 
 Note	***** 

Name	Visa
Group/folder	HTML Export
Url	<a href="http://www.visa.com">http://www.visa.com</a>
 Card owner	John Doe
Card type	Visa
Card number	***** 
Expiration	***** 
Validation (CVC)	***** 
PIN	***** 
Password	***** 

Sample output

When exporting multiple entries all will be contained within the same file. At decrypt time, each encrypted value must be decrypted individually for security reasons. Once you're done with the sensitive data simply hit F5 to refresh the file or simply close it. Your data is now safe from prying eyes.

## AES-256

We use AES-256 to encrypt/decrypt your sensitive data. Since the decryption is done entirely in the browser, there's no need for external tools, downloads or installs.

```

▼<tr>
  <td class="label Password">Password</td>
  ▼<td class="value Password">
    ▼<span id="dff570b2-5fb1-459b-af38-0fcb4f677484" data="U2FsdGVkX1/TAub+TpB+UrMU2m1RSVdiU8FP7tPnXAaBLZdySV9IiM2AKdIv0Siv">
      <a class="encrypted" onclick="javascript:decryptText('dff570b2-5fb1-459b-af38-0fcb4f677484')">*****</a>
    </span>
  </td>

```

Encrypted value

## Safe & Smart Virtual Backup

In addition, HTML Export using symmetric encryption is a great way to securely – and virtually – backup your passwords and other sensitive information. It allows you to share information via email, or simply send the file to your personal email account as a backup.

## 5.1.6 Options

### 5.1.6.1 Overview

#### Description

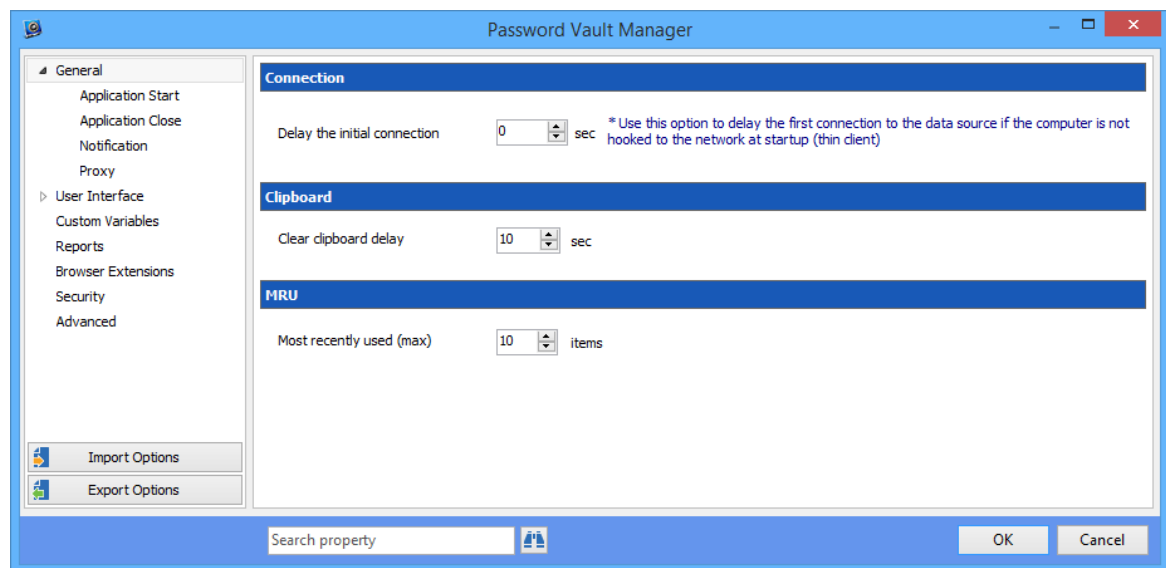
Password Vault Manager contains many option tabs such as:

- [General](#)
- [Tray icon/Taskbar](#)
- [Security](#)
- [Advanced](#)

### 5.1.6.2 General

#### Description

Use the **Options - General** tab to control application behaviour as it pertains to Startup and UI.



General Tab

## Settings

### Connection

Options	Description
Delay the initial connection	Use this option to delay the first connection to the data source if the computer is not hooked to the network at startup (thin client).

### Clipboard

Options	Description
Clear clipboard delay	Set the delay to empty the clipboard after a copy of a remote information.

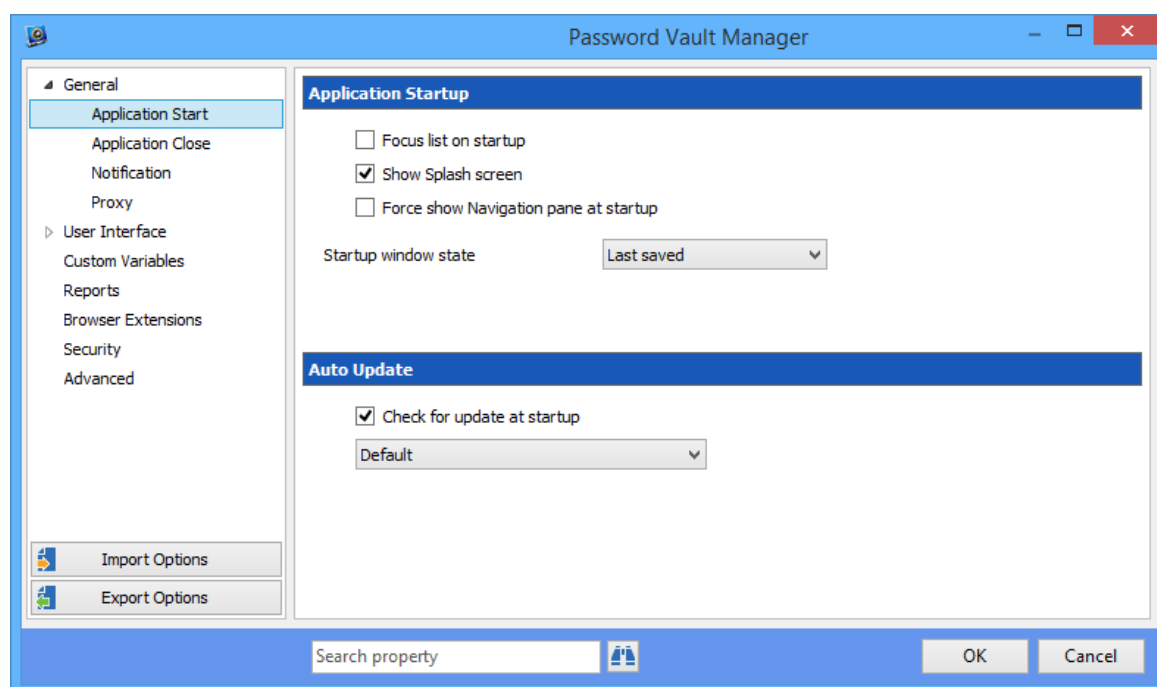
## MRU

Options	Description
Most recently used (max)	Indicate the maximum number of items to display in the list view. The maximum MRU limit is of 200 items. See <a href="#">MRU</a> topic for more information on Most Recently Used.

### 5.1.6.2.1 Application Start

## Description

Use the **File - Options - General - Application Start** to control application startup settings.



Application Start

## Settings

### Application startup

Option	Description
Focus list on startup	The focus will be set on the entry list when application starts.
Show Splash screen	Application will display the splash screen on startup.
Force show Navigation pane at startup	The Navigation pane list will be shown on start, even if it was hidden when the application was closed.
Startup window state	Indicate the display of the windows state at startup: <ul style="list-style-type: none"> <li>• <b>Last saved</b></li> <li>• <b>Minimized</b></li> <li>• <b>Maximized</b></li> </ul>

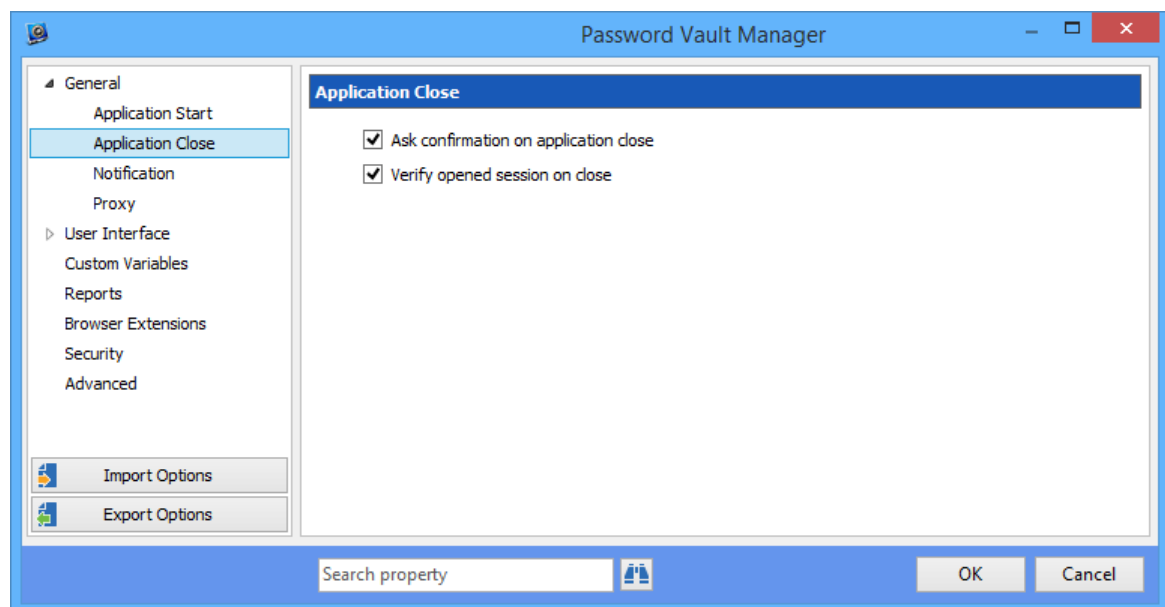
### Auto update

Option	Description
Check for update at startup	Application will perform a verification for new releases availability.
Default	Default setting.
Important Updates Only	Application will only update the important new releases.
Major and Minor Updates	Application will update all new releases.
All Updates Including Beta	Application will include beta version in the update verification.

#### 5.1.6.2.2 Application Close

### Description

Use the **File - Options - General - Application Close** to control application close settings.



Application Close

### Settings

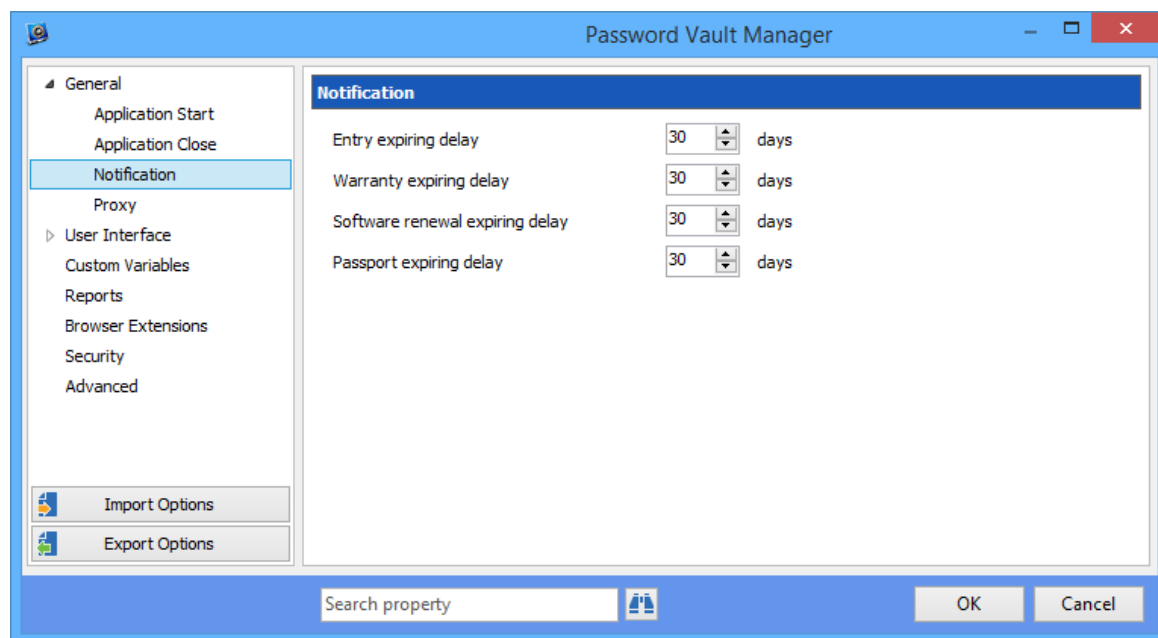
#### Application Close

Option	Description
Ask confirmation on application close	Application will prompt you for confirmation when you attempt to close it.
Verify opened session on close	Application will warn you about running sessions when you attempt to close it.

## 5.1.6.2.3 Notification

## Description

Use the **File - Options - General - Notification** to control application notification settings.



Notification

## Settings

### Notification

Option	Description
Entry expiring delay	Set the number of days to receive a notification before an entry expires.
Warranty expiring delay	Set the number of days to receive a notification before a warranty expires.
Software renewal expiring delay	Set the number of days to receive a notification to renew a software.
Passport expiring delay	Set the number of days to receive a notification before your passport expires.

## 5.1.6.2.4 Proxy

## Description

Use the **File - Options - General - Proxy** to control application proxy settings.

**Proxy Configuration**

**Proxy**

☒ No Proxy Address  Port

☐ System Default ☒ Bypass proxy server for local addresses

☐ Custom Do not use proxy server for addresses beginning with:  
  
 Use semicolons (;) to separate entries

**Credentials**

☐ Use specific credentials

Domain

Username

Password

Changes will be effective at next restart

OK Cancel

Proxy Configuration

## Settings

### Proxy

Option	Description
No Proxy	No proxy settings.
Bypass proxy server for local addresses	For local addresses, the proxy server will not be used.
System Default	Use the system default proxy.
Custom	Use a custom proxy by selecting the address and port. It's possible to built a list of exceptions with this option.

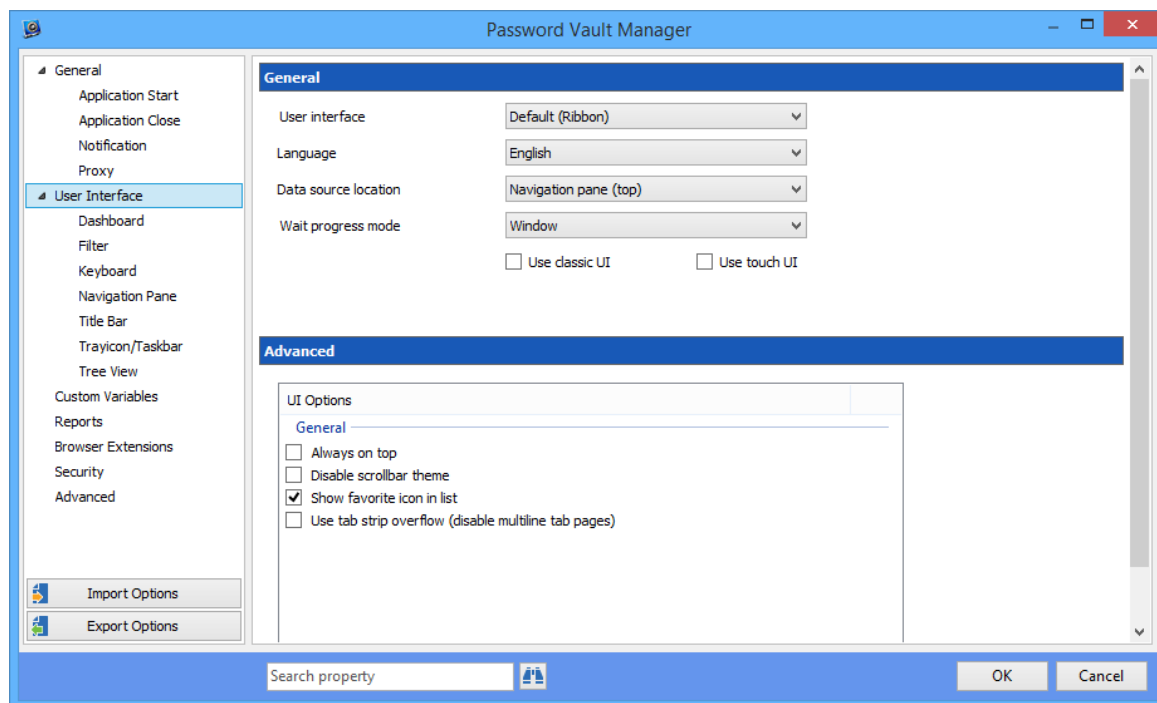
### Credentials

Option	Description
Use specific credentials	Use specific credentials when custom is selected.

### 5.1.6.3 User Interface

## Description

Use the **File - Options - User Interface** to control what is displayed in Password Vault Manager User Interface.



User Interface

## Settings

### General

Options	Description
User Interface	Indicate the user interface mode: <ul style="list-style-type: none"> <li>• <b>Default (Ribbon)</b></li> <li>• <b>Default (Menu)</b></li> </ul>
Language	Select your preferred language for the user interface.
Data source location	Select the position of your data source selection drop down: <ul style="list-style-type: none"> <li>• <b>Status bar</b></li> <li>• <b>Navigation Pane (top)</b></li> <li>• <b>Navigation Pane (bottom)</b></li> <li>• <b>None</b></li> </ul>
Wait progress mode	Display the wait progress information in a Window or Status bar. You can disable the wait progress by selecting None.



The Data Source Location **none** setting is not supported in the Classic UI mode.

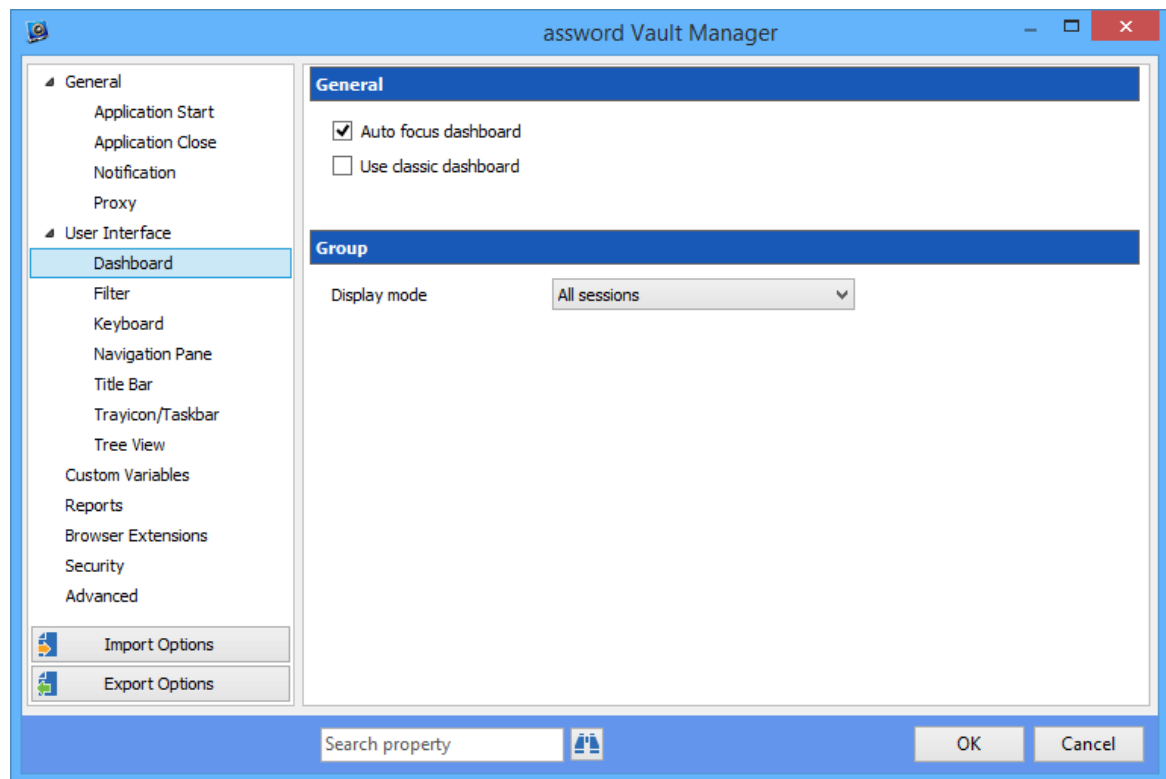
### Advanced

Options	Description
Always on top	Keeps the application on top of all others.
Disable scrollbar theme	Disable scrollbar theme. This is useful if you have issue clicking on the toolbar.
Show favorite icon in list	Favorite icon is overlaid on your session icon.
Use tab strip overflow (disable multiline tab pages)	When there are too many active tabs for the width of the application, having this option checked will result in a new line of tabs to appear. If unchecked then arrows will appear to indicate more tabs are present.

#### 5.1.6.3.1 Dashboard

### Description

Use the **File - Options - User Interface - Dashboard** to control how the application display the sessions in the Dashboard.



Dashboard

### Settings

#### General



Option	Description
Auto focus dashboard	When checked and an entry is selected in the tree view, the corresponding dashboard is displayed and focus is immediately set on it.
Use classic dashboard	The classic dashboard will be display instead of the new dashboard with larger buttons.

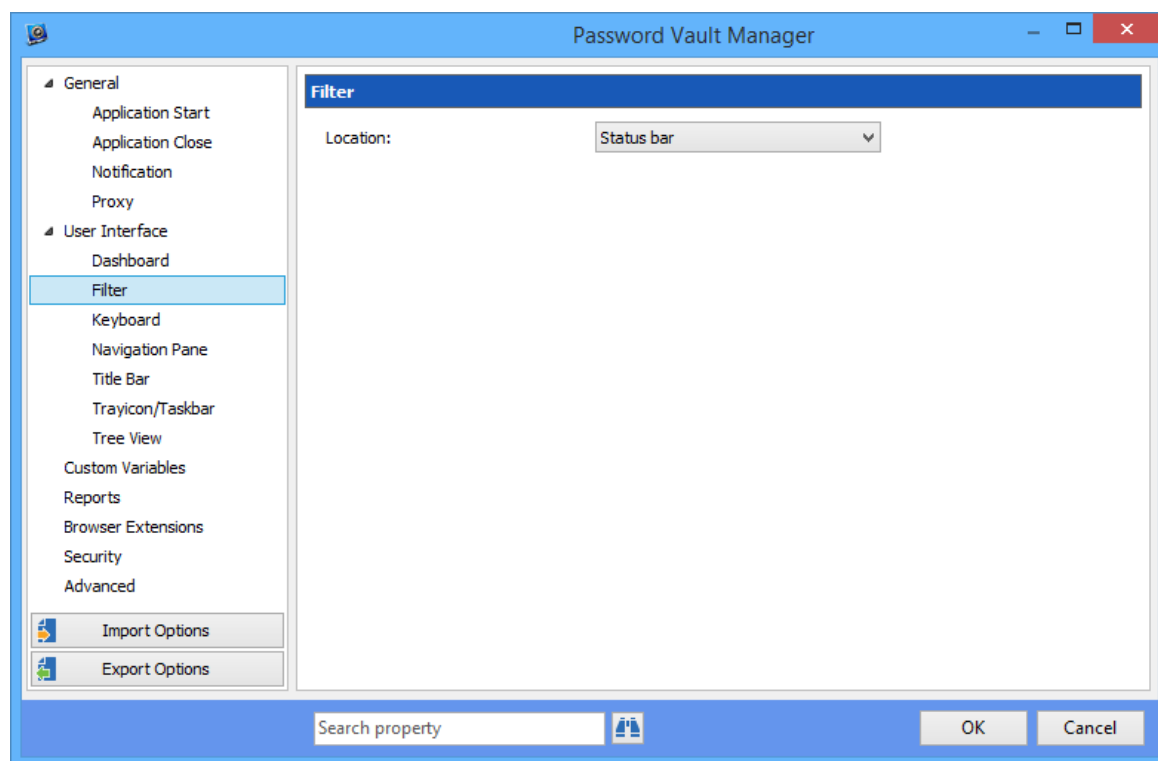
### Group

Option	Description
Display mode	<p>Determine how the entries are display in the group dashboard. Choose between:</p> <ul style="list-style-type: none"> <li>• <b>First level only:</b> only the entries and the groups located directly in the selected group are listed.</li> <li>• <b>All sessions:</b> all the entries are listed including those contained in the sub-folders.</li> <li>• <b>Default (all if not more than...):</b> All entries will be display if not more than the select number when the Default option is active.</li> </ul>

#### 5.1.6.3.2 Filter

### Description

Use the **File - Options - User Interface - Filter** to control application filter box and settings. See topic [Search/Filter](#) for more information.



**Filter**

## Settings

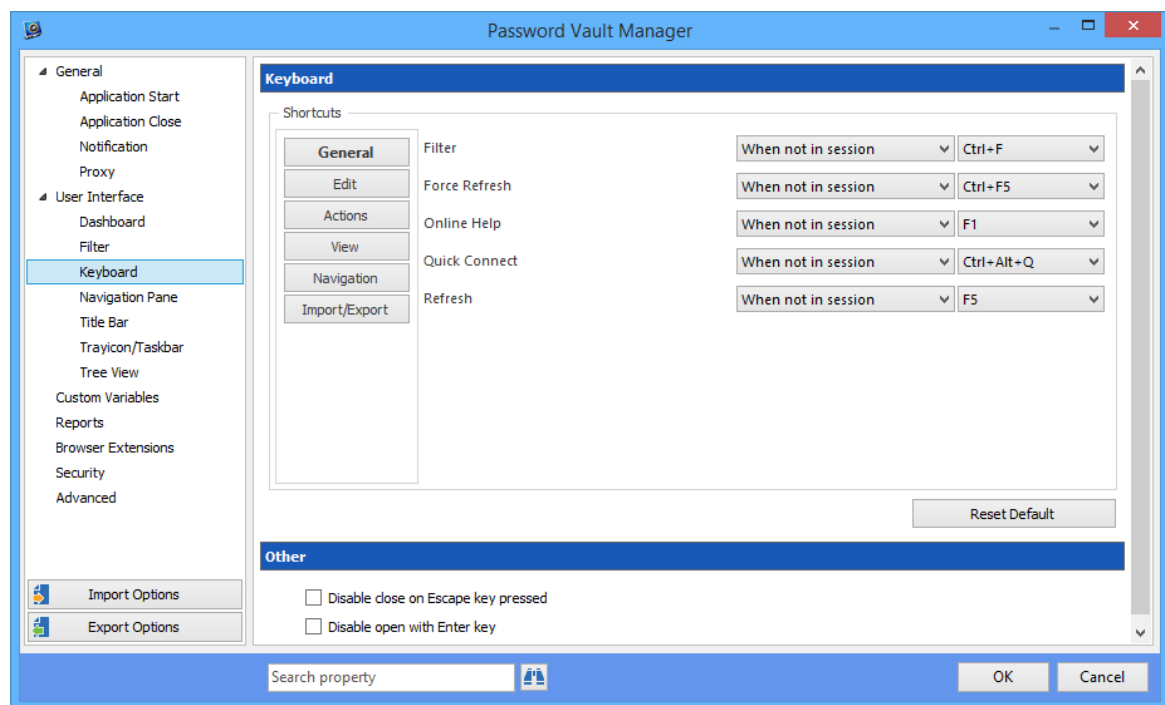
### Filter

Option	Description
Location	<p>For the location of the filter box, you can choose between:</p> <ul style="list-style-type: none"> <li>• <b>Status bar</b></li> <li>• <b>Navigation pane (bottom)</b></li> <li>• <b>Navigation pane (top)</b></li> <li>• <b>None</b></li> </ul> <p>When None is selected, a dialog will appear when the shortcut is press.</p>

#### 5.1.6.3.3 Keyboard

### Description

Use the **File - Options - User Interface - Keyboard** to control how the application handles keyboard input.



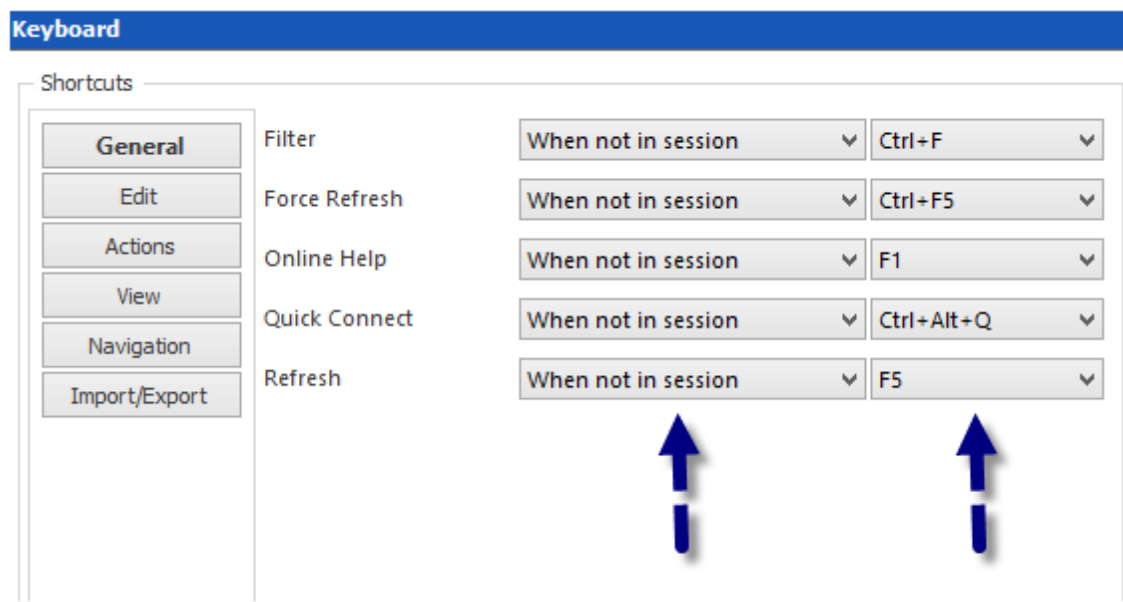
Keyboard

## Settings

### Keyboard

On the left there are different shortcuts categories. This lightens the screen and allows you to focus on less shortcuts at the same time.

To configure a keyboard shortcut for an action, two controls are provided.



Keyboard Shortcuts

### Shortcuts

The first drop down is for the scope of the keyboard shortcut.

Option	Description
Default	Use default shortcut keys. Use the magnet in the status bar to disable the shortcut.
When not in session	Use the shortcut keys when the focus is not in a session.
Global hotkey	This create global window hot key. For example, you can use it to execute a macro when Password Vault Manager is not loaded.
None	Select the "none" item to remove any hot key for the corresponding action.



Currently no validation is performed as to your usage of the same key combination for two actions.

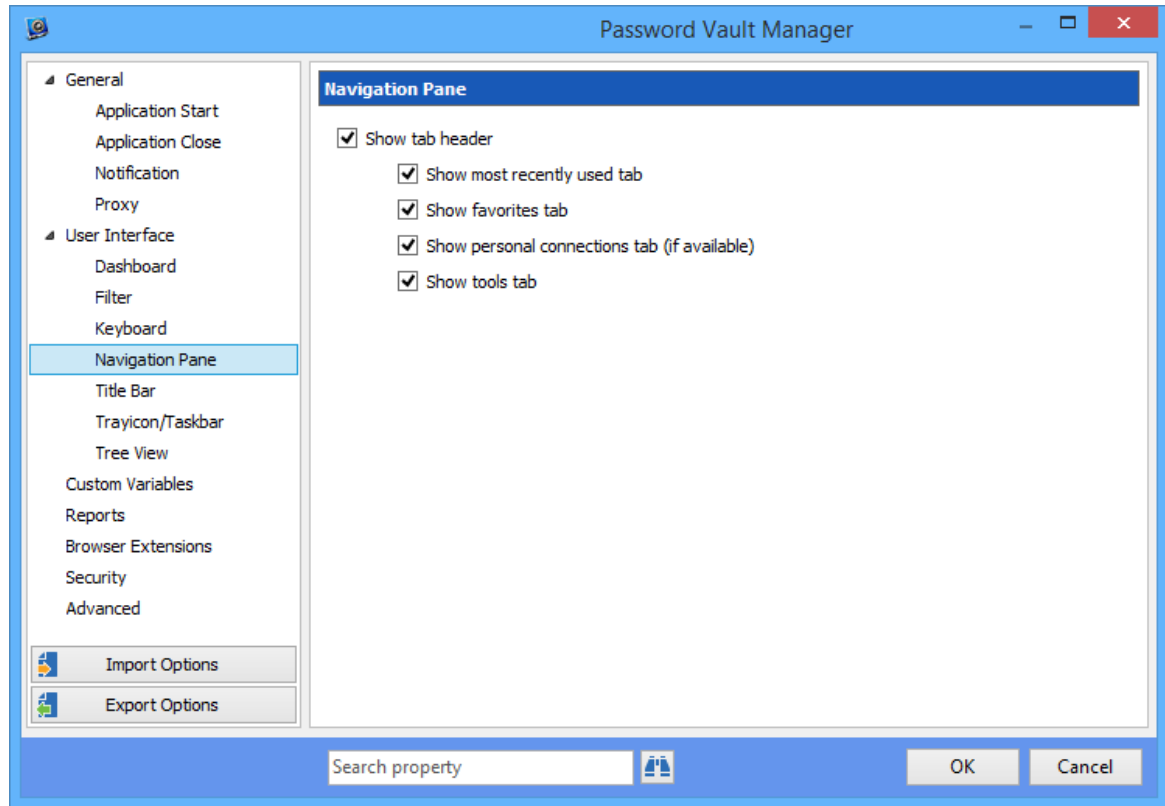
### Other

Option	Description
Disable open with Enter key	Pressing the Enter key while an entry is selected will not open it.
Disable close on Escape key pressed	Pressing the Escape key while in a running session will not close it.

## 5.1.6.3.4 Navigation Pane

## Description

Use the **File - Options - User Interface - Navigation Pane** to control application Navigation Pane display.



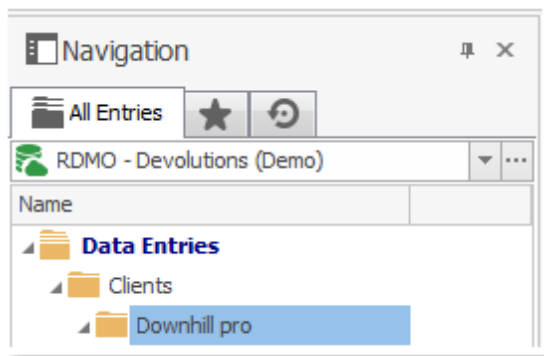
Navigation Pane

## Settings

### Navigation Pane

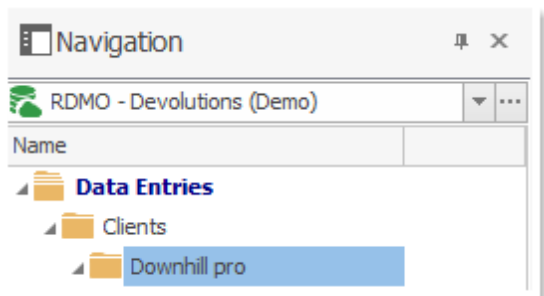
Option	Description
Show tab header	Display the tabs header in the Navigation Pane.
Show most recently used tab	Display the <a href="#">Most Recently Used</a> tab in the Navigation Pane.
Show favorites tab	Display the <a href="#">Favorites</a> tab in the Navigation Pane.
Show personal connections tab (if available)	Display the Private Vault tab in the Navigation Pane.
Show tools tab	Display the Tools tab in the Navigation Pane.

### With Header



Header

### *Without Header*

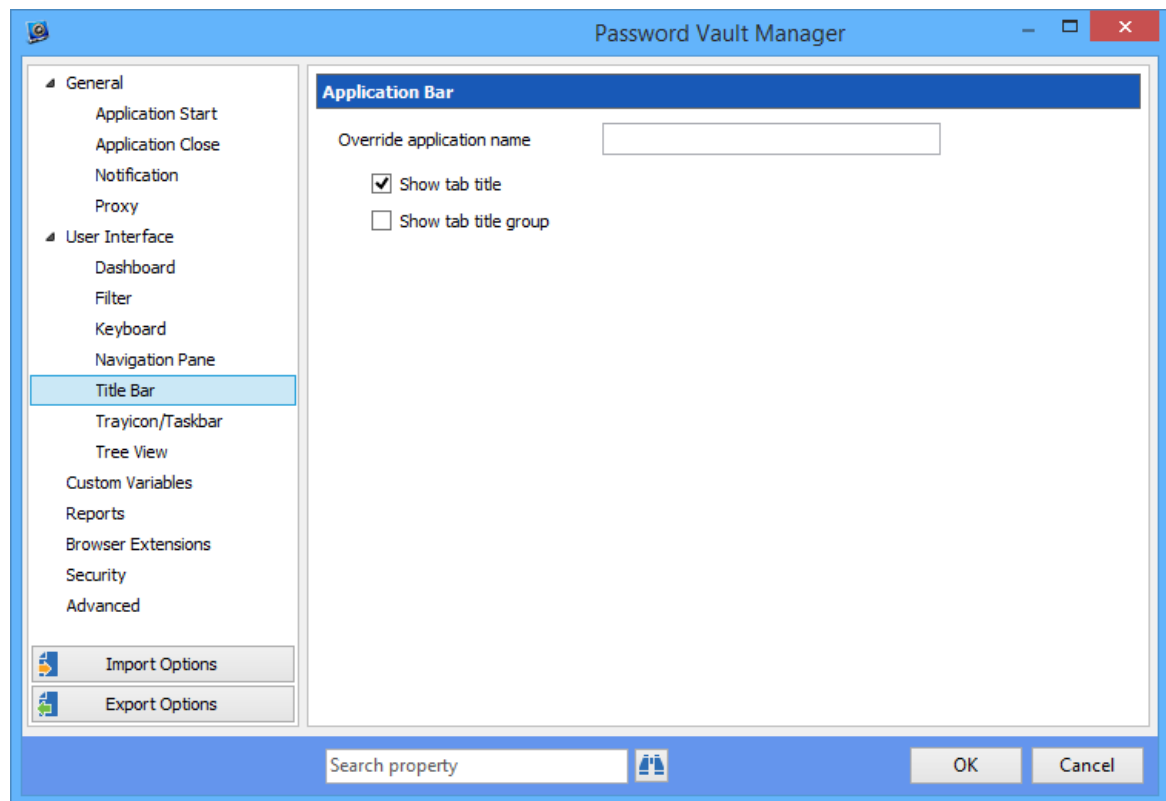


Without Header

#### 5.1.6.3.5 Title Bar

### Description

Use the ***File - Options - User Interface - Title bar*** to control application title bar.



Title bar

## Settings

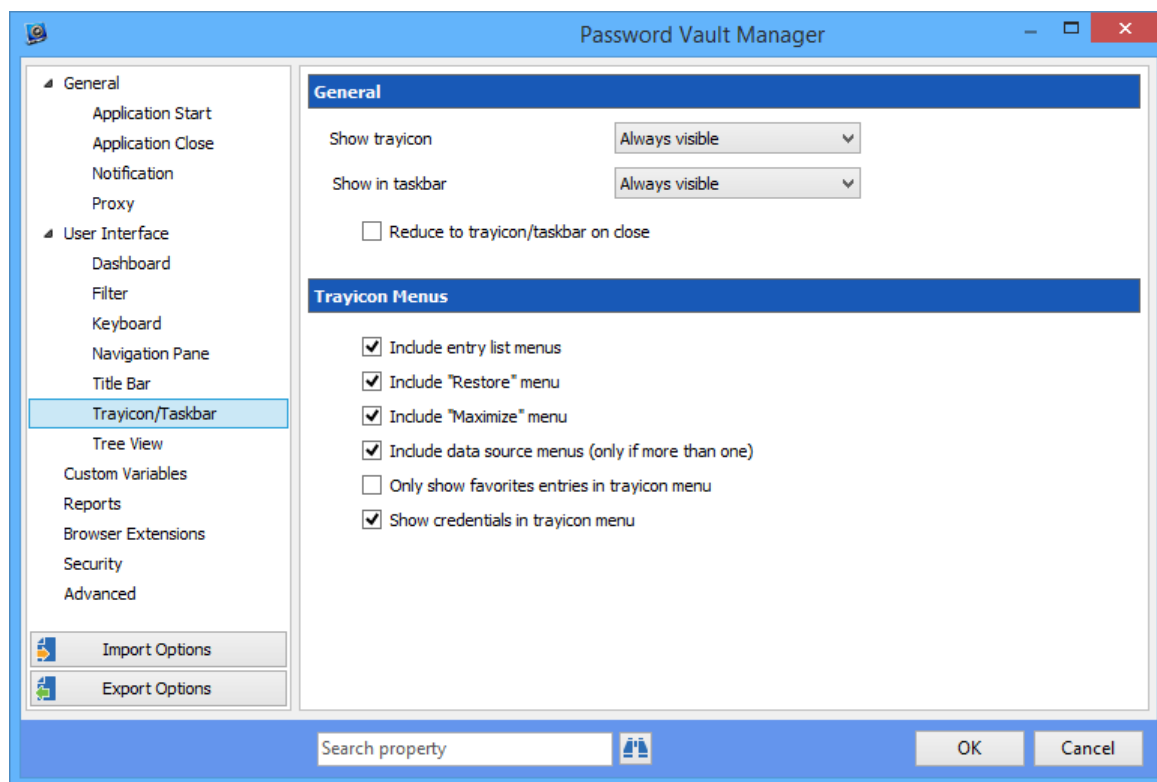
### Application bar

Option	Description
Override application name	Display a custom title for the application title bar. Use this setting to get a unique identifier when you have multiple instances opened or when you use multiple versions side by side.
Show tab title	The application bar will append the caption of the current tab to the name to the title bar.
Show tab title group	This will prefix the tab title name with the session group name. It will also appear in the application title bar.

#### 5.1.6.3.6 Trayicon/Taskbar

### Description

Use the **Options - Trayicon/Taskbar** tab to control the application tray icon and taskbar.



Trayicon/Taskbar Tab

## Settings

### General

Option	Description
Show Tray Icon	Choose between: <ul style="list-style-type: none"> <li>• <b>When not minimized</b></li> <li>• <b>Always visible</b></li> <li>• <b>Never visible</b></li> </ul>
Show in taskbar	Choose between: <ul style="list-style-type: none"> <li>• <b>When not minimized</b></li> <li>• <b>Always visible</b></li> <li>• <b>Never visible</b></li> </ul>
Reduce to trayicon/taskbar on close	Clicking on the X will minimize RDM instead of close it.

### Trayicon Menus

The options control the popup menu of the tray icon.

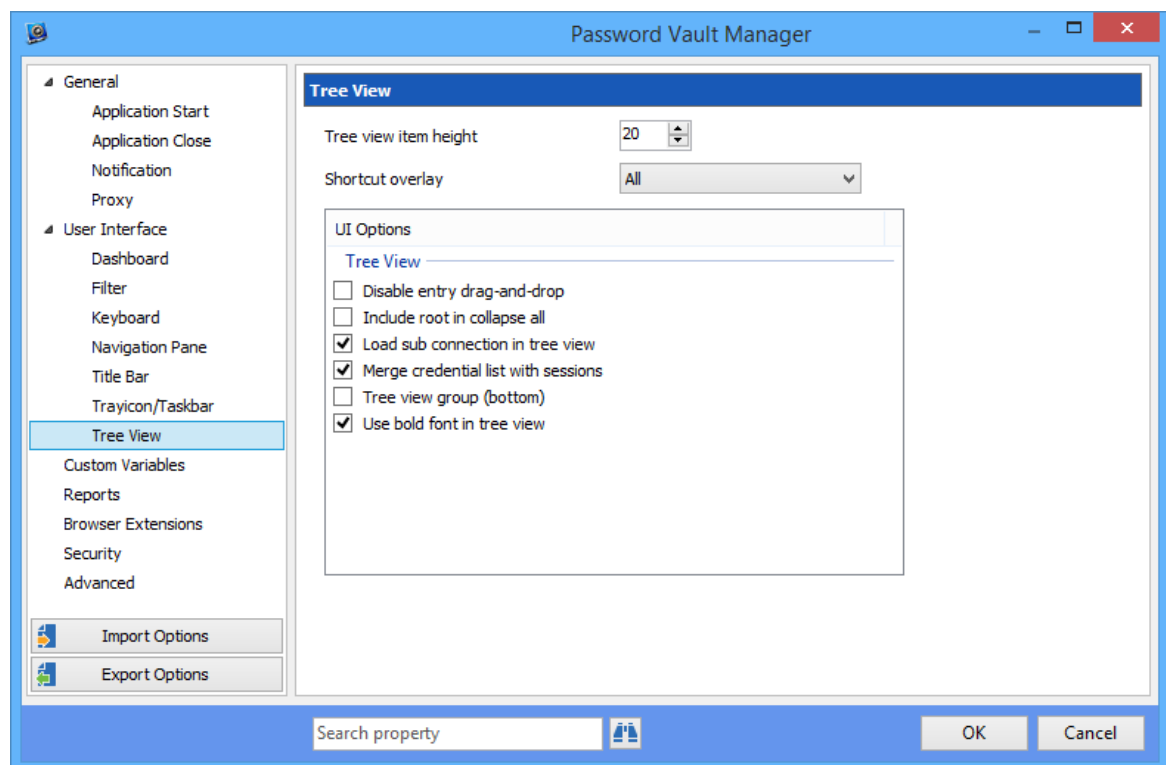
Option	Description
Include entry list menus	Includes the entries in the <a href="#">Tray Icon</a> menu.
Include "Restore" menu	Includes a menu to restore application when it has been minimized.

Include "Maximize" menu	Includes a menu to maximize the application window to take the full area of the screen.
Include data source menus (only if more than one)	Includes a sub-menu for the data sources. This requires more than one data source to function.
Only show favorites entries in trayicon menu	Only the <a href="#">Favorite Entries</a> will appear in the tray icon menu.
Show credentials in trayicon menu	Indicate if the credentials are listed in the tray icon menu.

#### 5.1.6.3.7 Tree View

### Description

Use the **File - Options - User Interface - Tree View** to control application tree view.



Tree View

### Settings

#### Tree View

Option	Description
Tree view item height	Specify the height of individual items in the Tree view. Valid values are between 16 and 32.
Shortcut overlay	Determine on which items the shortcut icon is visible. Choose between: <ul style="list-style-type: none"> <li>• <b>All</b></li> </ul>



- *None*
- *All except original*

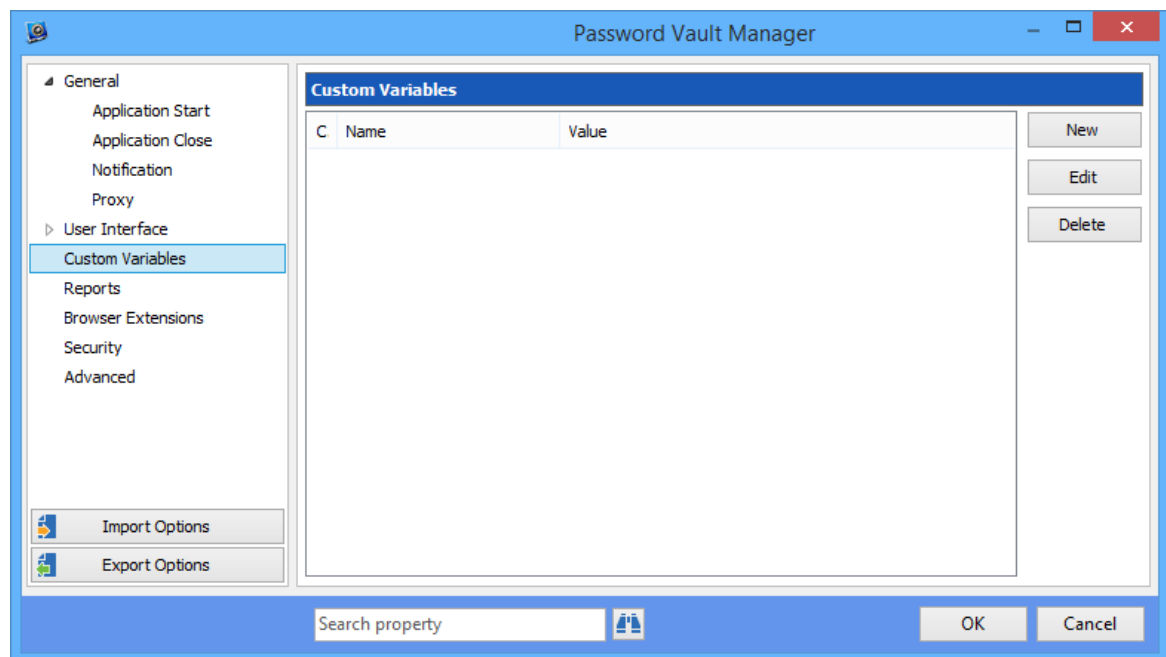
### UI Options

Option	Description
Disable entry drag-and-drop	This setting disables moving entries with drag-and-drop. Use this option to avoid any unwanted session create by drag and drop by mistake. If you do use the drag-and-drop a confirmation window will pop up every time making sure the move is wanted.
Include root in collapse all	By default the application has many root nodes in the tree view. i.e. Sessions, Credentials, Macros/Scripts/Tools. Collapsing the tree view will also collapse every root nodes if this option is enabled. Only the children of the current root are affected by the command when this option is not enabled.
Load sub connection in tree view	Indicate if the sub connections appear under their parent in the tree view. You can use the sub-connection pane if you don't want them listed in the tree.
Merge credential list with sessions	Use this option if you want the credentials to appear within the list of Sessions instead of in their own root.
Tree view group (bottom)	This setting indicates if the Group/Folder entries are at bottom of the list instead of appearing first under their parent.
Use bold font in tree view	Indicate if the root level items are displayed using the bold attribute.

#### 5.1.6.4 Custom Variables

### Description

Use the **File - Options - General - Custom Variables** to manage your own variable.



Custom Variables

## Settings

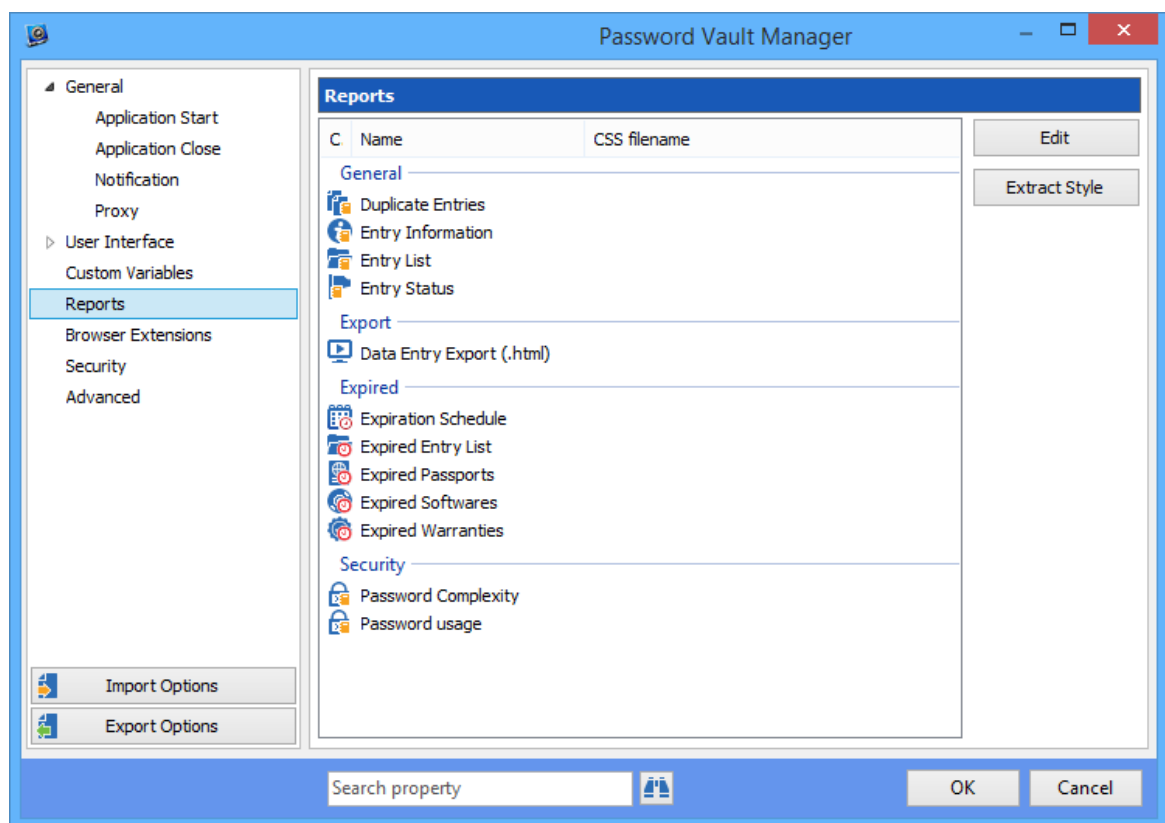
### Custom variables

The custom variables option has been implemented to customize your own variables in the application.

#### 5.1.6.5 Reports

### Description

Use the **File - Options - Reports** to customize the style of your reports.



Reports

## Settings

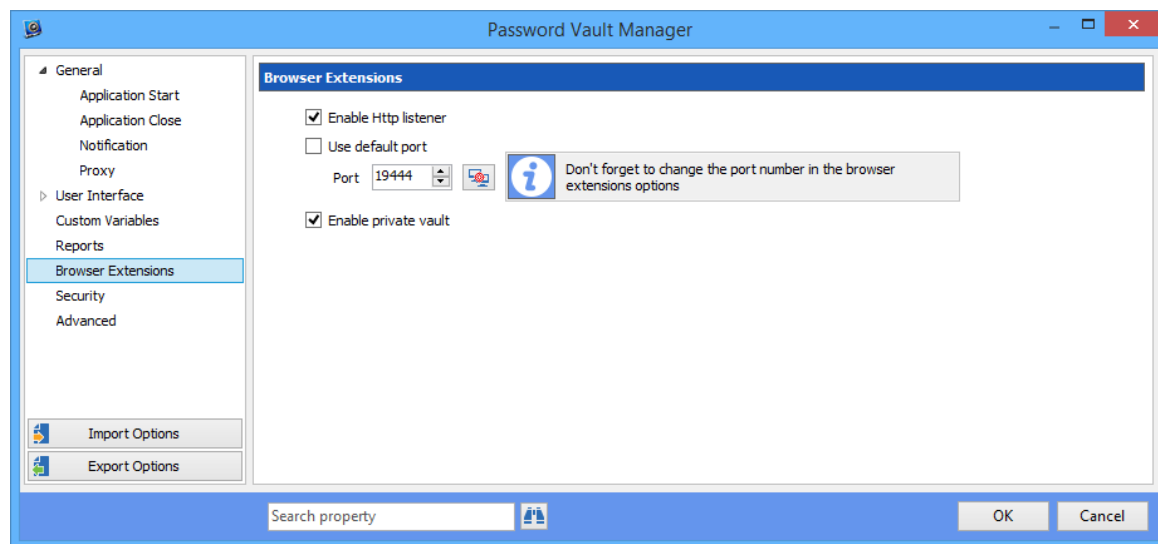
### Reports

Option	Description
Edit	Select the proper CSS file to customize the display of a report. A CSS file is a plain text format that contain all the display settings.
Extract Style	Extract the style of a report in a CSS file.

### 5.1.6.6 Browser Extensions

#### Description

Use the **File - Options - Browser Extensions** to control specific settings in the browser extension such as the default port.



Browser Extensions

#### Settings

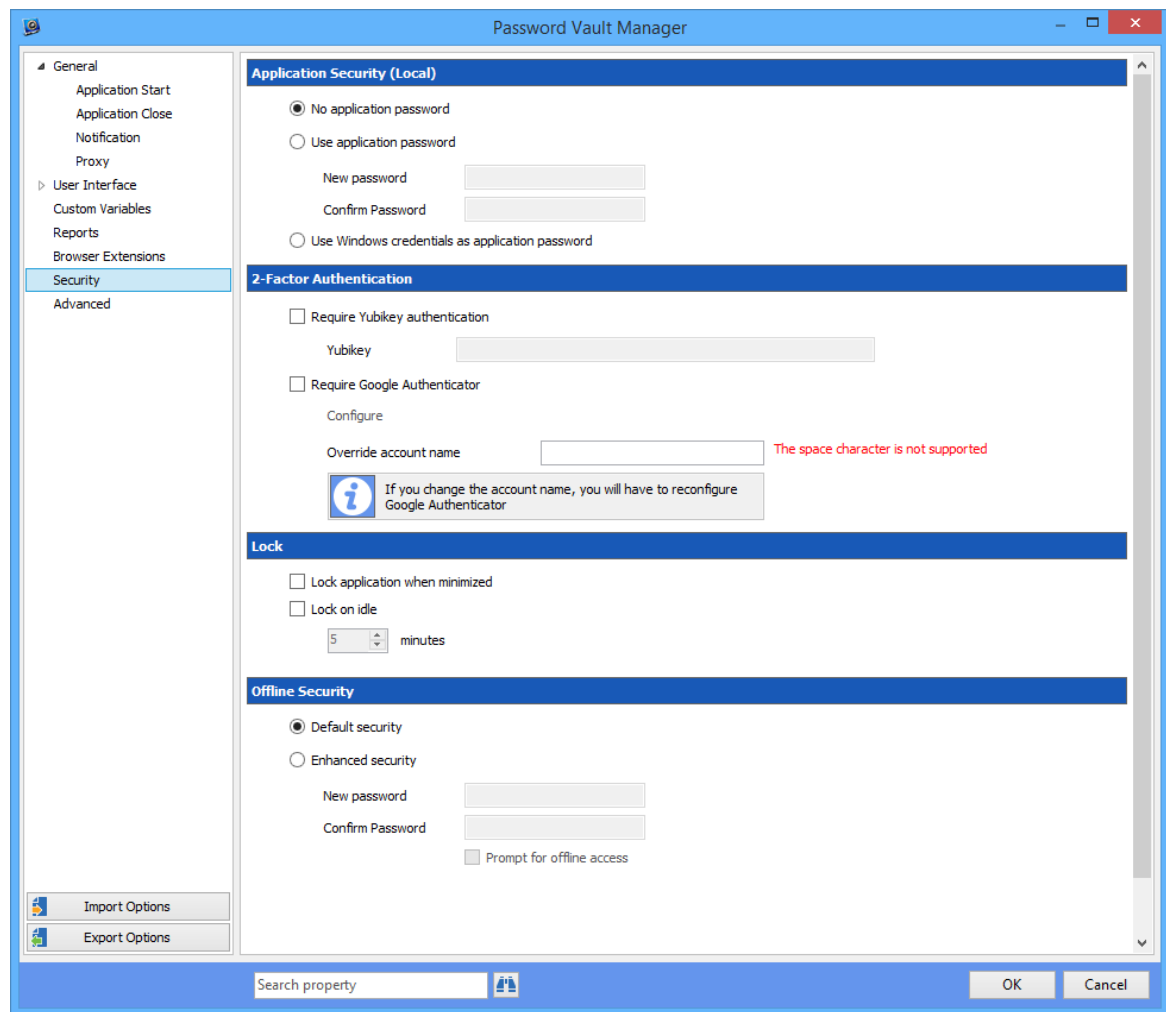
##### Browser Extensions

Option	Description
Enable Http listener	Enable a programmatically controlled HTTP protocol listener.
Use default port	Indicate the default port that you want to use in your browser extension. Don't forget to change the port number in the browser extensions options.
Enable private vault	Enable the browser extensions to be use with the Private Vault..

### 5.1.6.7 Security

#### Description

Use the **File - Options - Security** to control application behavior as it pertains to system security.



### Security

## Settings

### *Application security (local)*

Option	Description
No application password	The application will have no security enabled. However it's recommended to use the default Windows lock workstation feature.
Use application password	Enable the application level security and define a specific password to access the application.
Use Windows credentials as application password	Enable the application level security and requires the same password as your Windows password. The application needs an access to the domain to authenticate the user.

### *2-Factor authentication*

Option	Description
--------	-------------

Require Yubikey authentication	Use a Yubikey device to get access to the application when it starts or when it's locked.
Require Google Authenticator	Use a Google Authenticator device to get access to the application when it starts or when it's locked.

Consult the Yubikey authentication topic or the Google Authenticator topic to learn how to configure the 2-factor authentication.

### Lock

Option	Description
Lock application when minimized	Lock application when minimized in the taskbar.
Lock on idle	Automatically lock the application when it's not used after a determined number of time. The value is in minute.

### Offline security

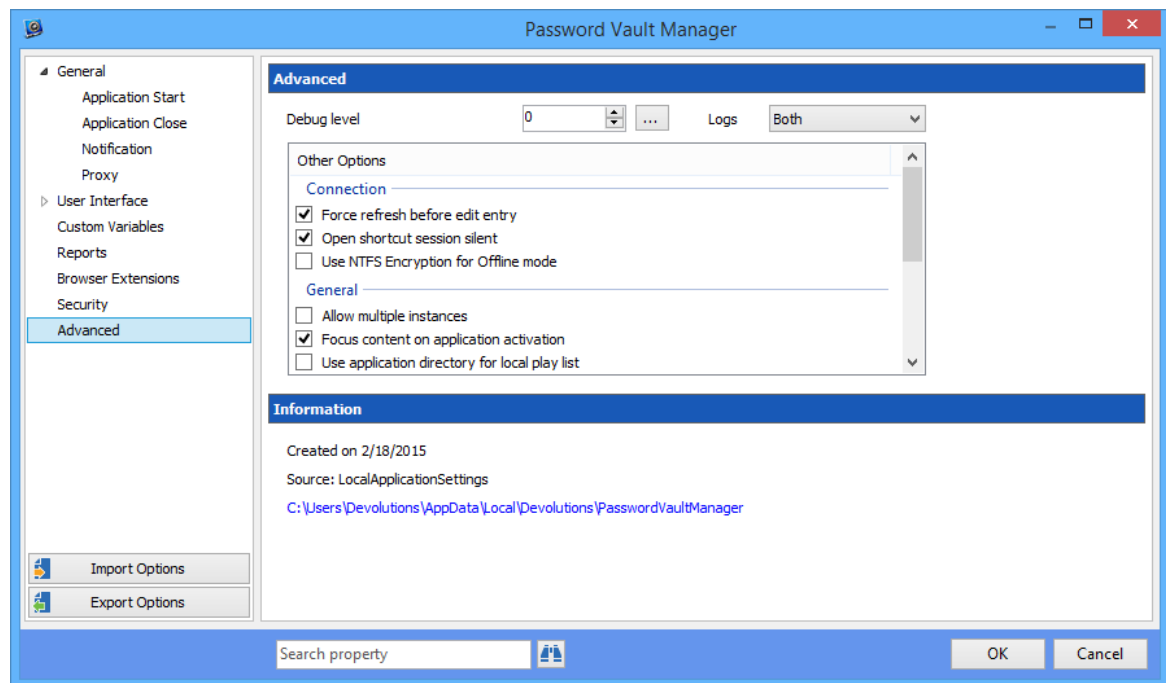
This section contains the global offline security settings.

Option	Description
Default security	The application uses an offline file that is encrypted with a non-portable computed key hash.
Enhanced security	The application uses an offline file that is encrypted with a hash of the non-portable computed key plus user specific password. This password is saved internally by default.
Prompt for offline access	This checkbox force the user to enter the password prior to accessing the offline data.

#### 5.1.6.8 Advanced

### Description

Use the **File - Options - Advanced** tab to control application behavior as it pertains to low level settings.



Advanced

## Settings

### Advanced

Option	Description
Debug level	Set the level of debugging information that Password Vault Manager will capture. This should be modified only on request from a Devolutions support technician and it might slow down your system.
Logs	<p>The logs can be saved in a file or in a database file. Select between:</p> <ul style="list-style-type: none"> <li>• <b>Both:</b> Logs will be saved in the text file and in a database file.</li> <li>• <b>Database:</b> Logs will be saved in a file named RemoteDesktopManager.log.db. The file is located in the installation folder of the application.</li> <li>• <b>File:</b> Logs will be saved in a file named RemoteDesktopManager.log. The file is located in the installation folder of the application.</li> </ul>

### Other Options - Connections

Option	Description
Force refresh before edit entry	This will perform a refresh of the entry just before entering in edit mode. This is useful in a multi-user environments with a shared data sources. This ensure that you are editing the most recent version of the entry.
Open shortcut session silent	Disable the command line warning message when using a shortcut.
Use NTFS Encryption for Offline mode	When using Offline Mode, a local file is created to hold a copy of the data source. If this is enabled the local file is encrypted using the built-in NTFS encryption of Windows. This setting may cause delays when accessing the data source because the local file is refreshed

on every access.

### Other Options - General

Option	Description
Allow multiple instances	Allows more than one instance of Password Vault Manager to run concurrently. This is not recommended.
Focus content on application activation	This will set focus on the last embedded session when the application is activated.
Use application directory for local play list	Use the installation folder to save the local play list that has been created.
Use application directory for offline cache	Use the installation folder to save the offline cache file.

### Other Options - UI Options

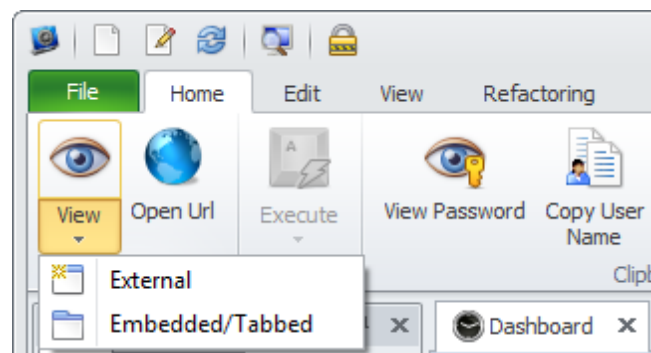
Option	Description
Always show "Go Offline" button	It will always display the "Go Offline" button in the status bar when the <a href="#">Offline Mode</a> is active.
Disable custom images	This will disable the loading of any custom images in the tree view. Too many custom images could dramatically increase the size of the data source and increase the load time at the same time.
Hide last opened play list in play list management	This will not show the last opened play list at the startup in the play list dialog.
Use old entry sort	Use the old entry sort from previous version of Password Vault Manager.

## 5.2 Home

### 5.2.1 Data Entry

#### Description

Two actions are available: View and Open URL.



Data entry section of the ribbon

#### View

You can open the URL indicated in the data entry either externally or in the embedded browser. The menus are disabled if the URL property of the data entry is empty.

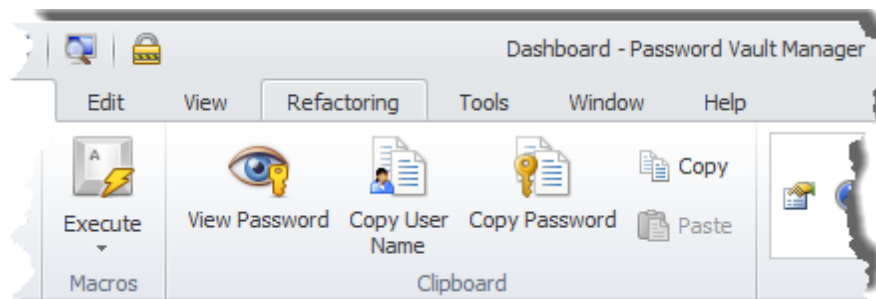
## 5.2.2 Clipboard

### Description

Using the clipboard, you can copy data entries values such as:

- User name
- Password
- Data Entry (used to copy entries from one data source to another)

You can access the clipboard action via the **Home -> Clipboard** ribbon bar or via the right-click menu **Clipboard -> ...**

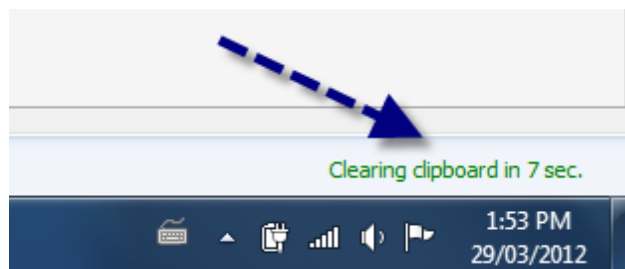


Clipboard ribbon bar

To access the User name and the Password from the clipboard, you must have entered the data in your session.



For security reasons, the clipboard will be cleared after **10** seconds when you copy a password. The delay can be configured via the system options, see [Options](#) for more information.

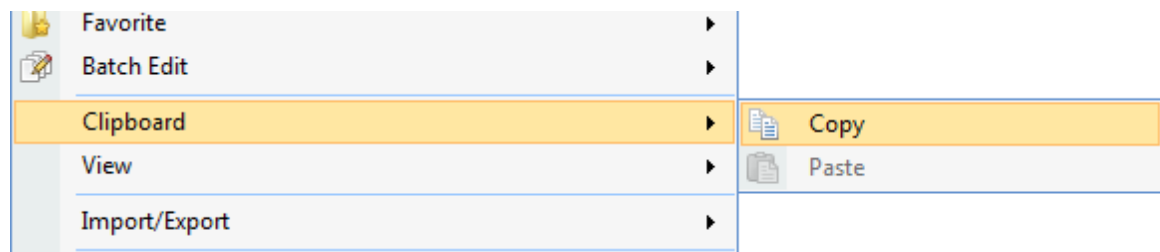


Clipboard clear notification

### Copy/Paste session entries

The Copy/Paste of an session entry is also possible. Paste into a different data source or to simply create a copy of an entry. It is a quick way to move/duplicate an item.



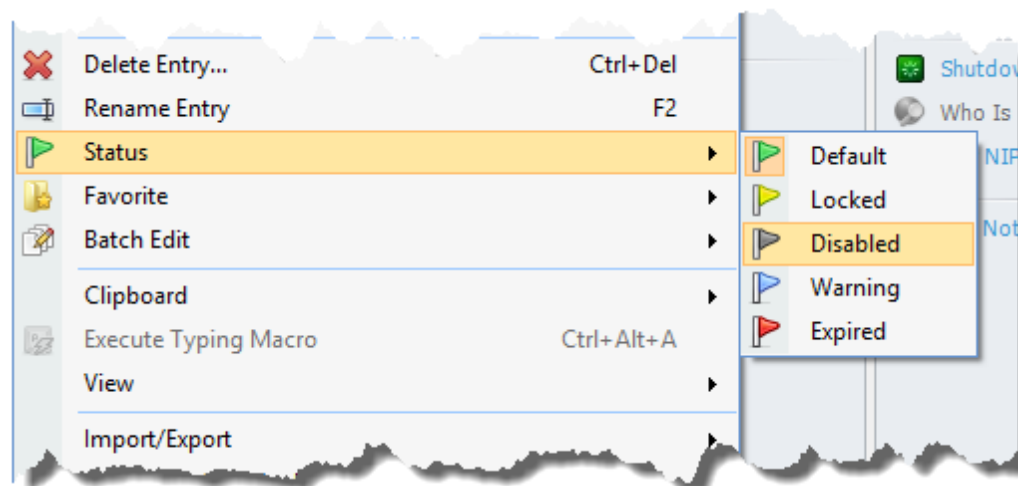


Copy/Paste

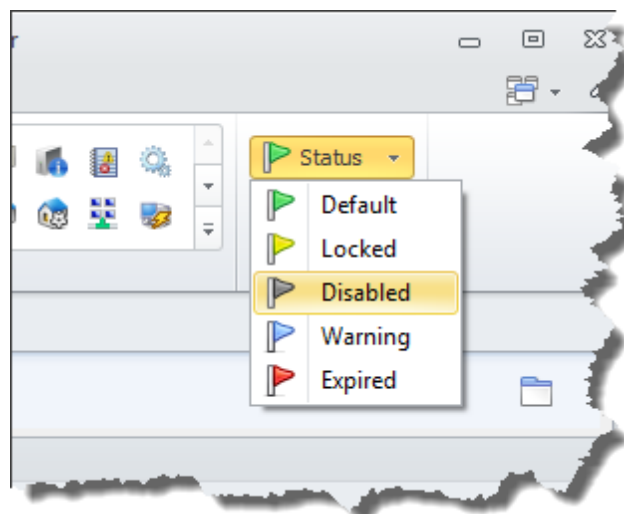
### 5.2.3 Status Management

#### Description

Right-click on the desired from the menu **Session->Status**



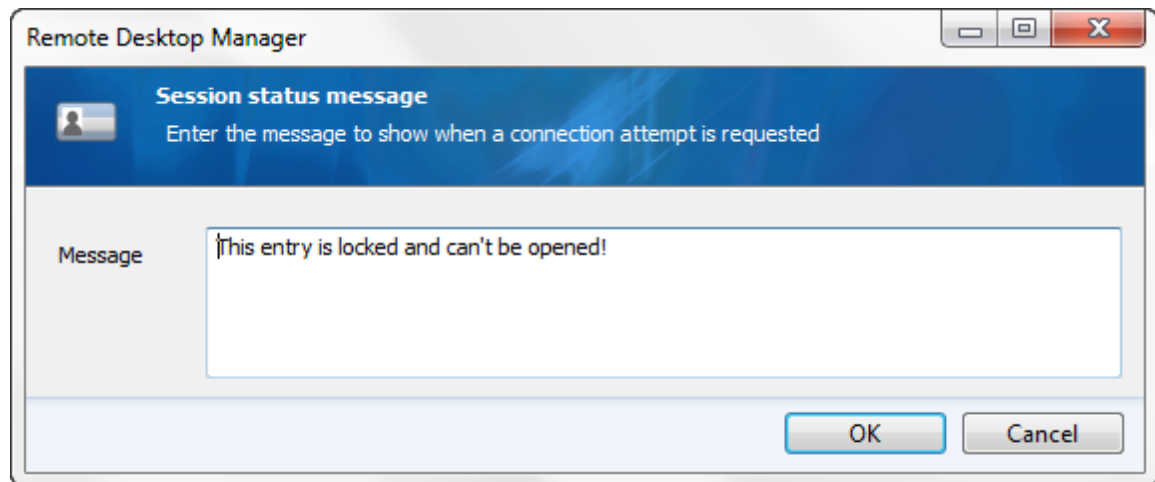
Status management menu



Status management ribbon bar

#### Status Locked

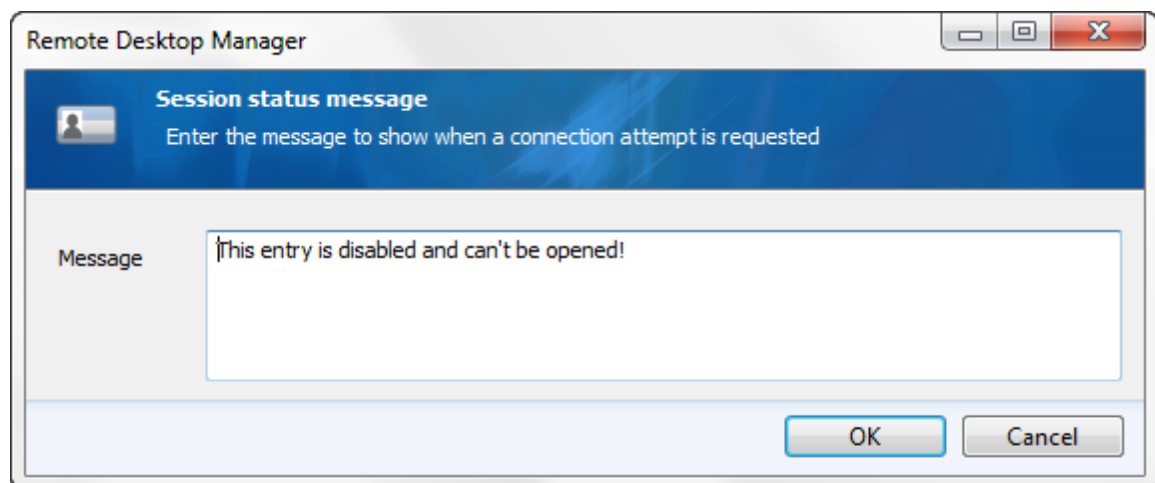
This allows the user who has locked the session to use it and block the others.



Status Locked

## Status Disabled

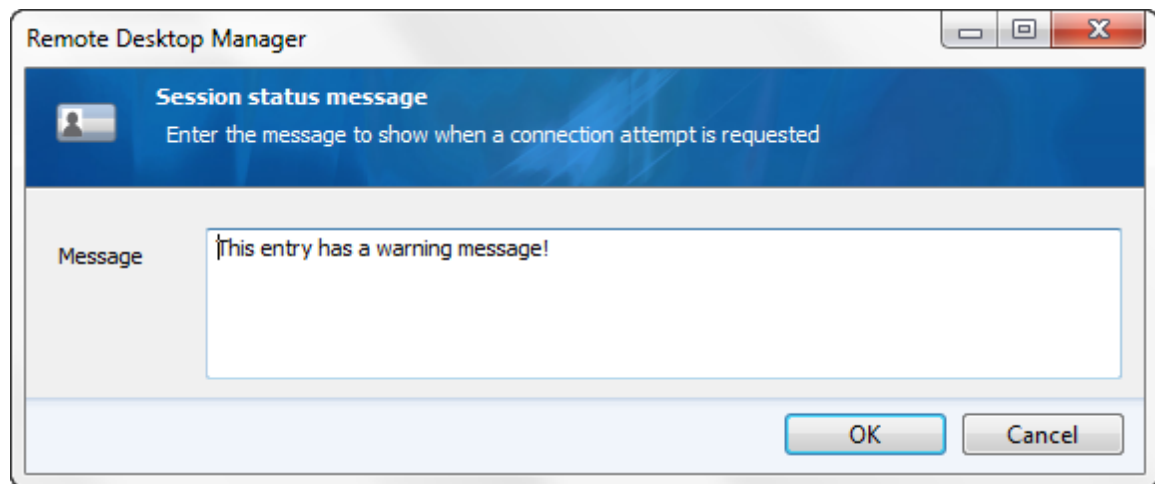
A disabled session can't be opened. It's mostly used when you don't want to delete it but avoid any unattended connection. It's also useful to disable an account for one of your former customer.



Status Disabled

## Status Warning

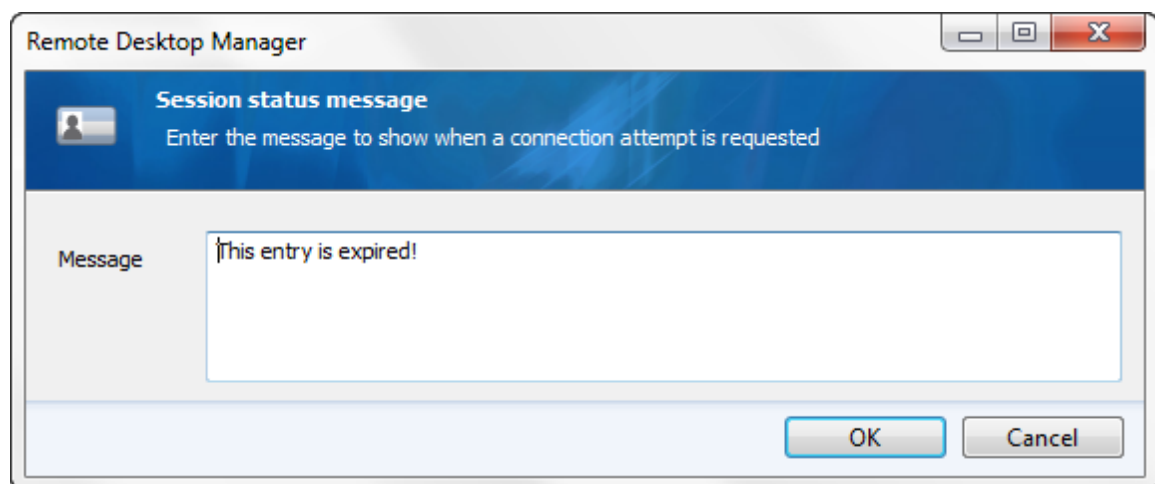
This status does not cancel the session opening and allows to show a message before his opening.



Status Warning

## Status Expired

An expired session can't be opened. It can be set manually or automatically if the session expiration date is set in his property.



Status Expired

## 5.2.4 Favorites

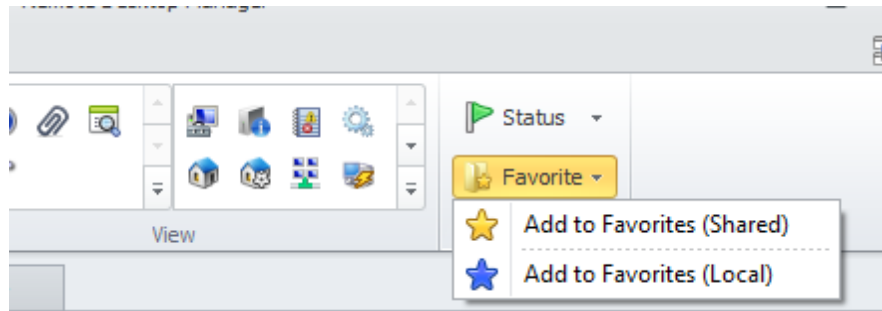
### Description

For your convenience, a feature to tag entries as favorites is provided. This is useful when the number of managed entries becomes too great or if you must maintain a strict directory structure to hold your entries.

In order to provide the best experience two kinds of favorites exist : Local or Shared. The local favorites are stored locally and are only for you. The shared favorites on the other hand are stored in the shared data source and are therefore available to all users.

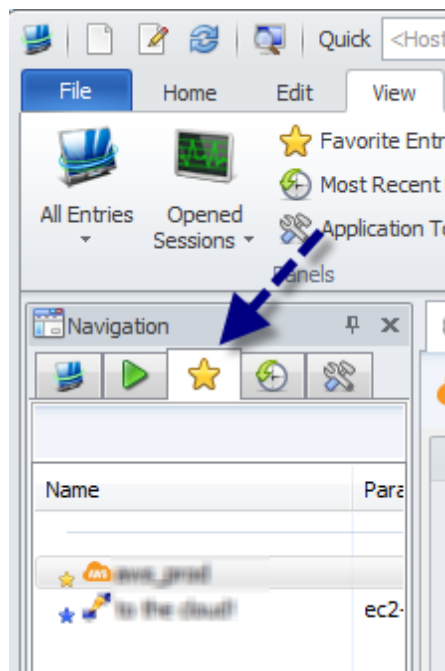
### Settings

They are accessed by **Home -> Favorites**.



**Setting an entry as a favorite**

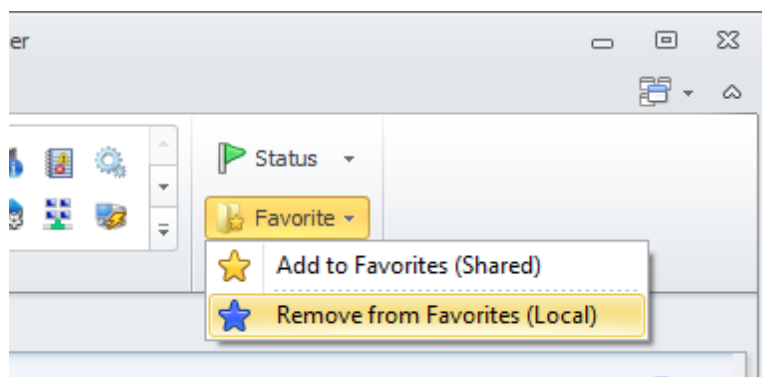
They are displayed in the Navigation pane, on the Favorites tab.



**Favorites Tab**

Also note the color of the star, it is yellow for Shared favorites and blue for Local Favorites.

To remove an entry from your favorites, you again use the Home -> Favorites menu. The drop down menu will instead contain the option to Remove from Favorites.



Remove from Favorites

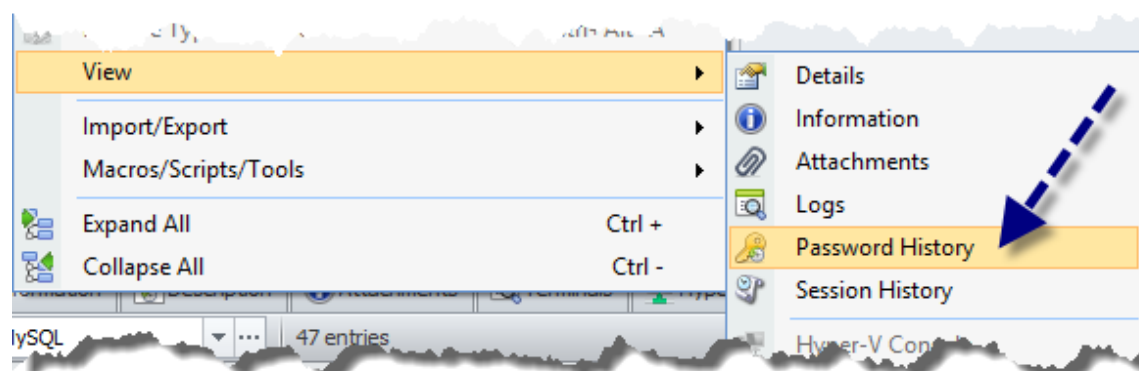
## 5.2.5 Password History

### Description

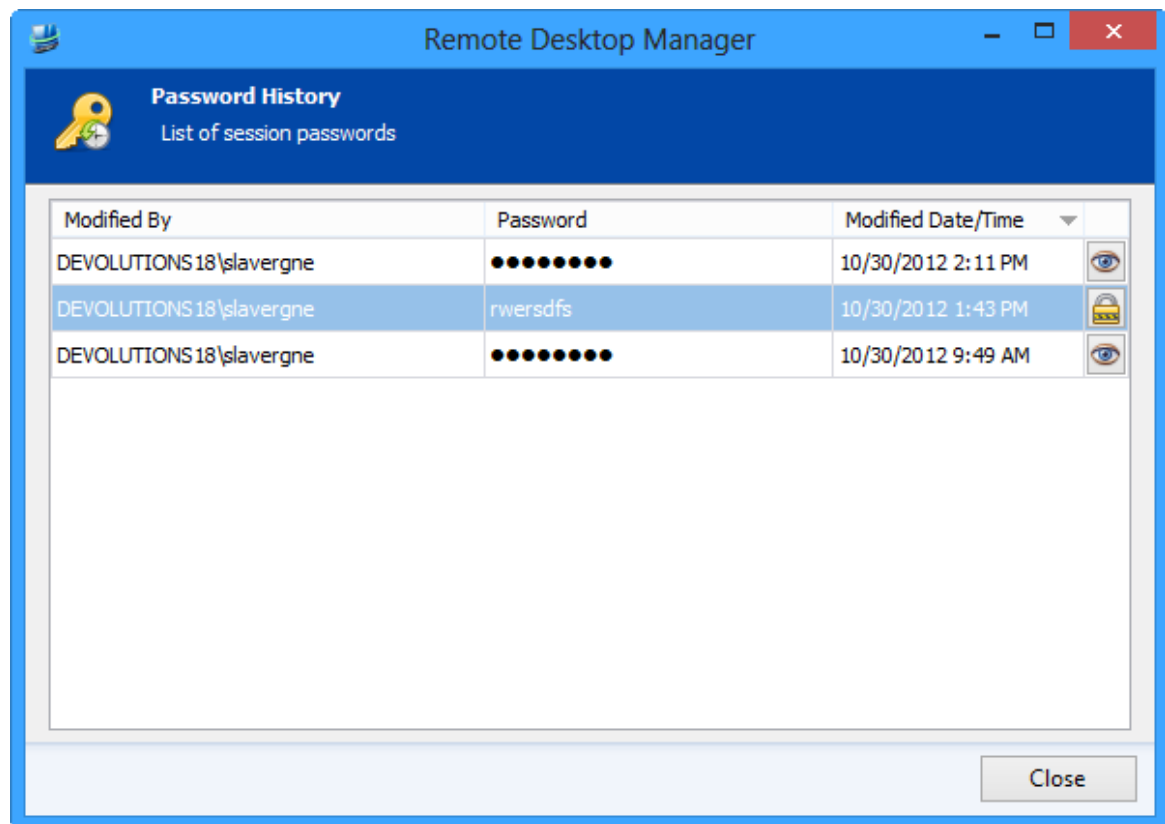
Password History feature allows for viewing of the password history. The number of historical passwords to save is set in the **Data Source Settings -> Password Policy -> Password history X items**.

You must be admin of the data source to perform this action.

This feature is only available when using an advanced data source such as MSSQL & MySQL.



Right-click View -> Password History



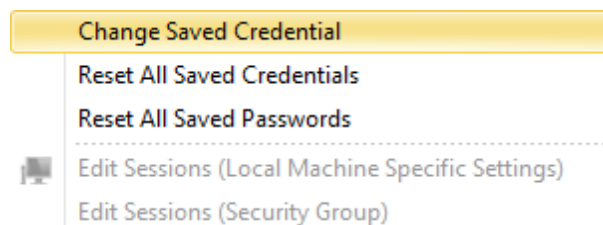
Password History view

## 5.3 Edit

### 5.3.1 Batch Edit

#### Description

Batch Edit is used to change the settings of multiple entries in one operation. It can be used to remove or update all of the credentials of a group of entries. This option can be found in the entry context menu and in the Edit ribbon.



Batch edit context menus

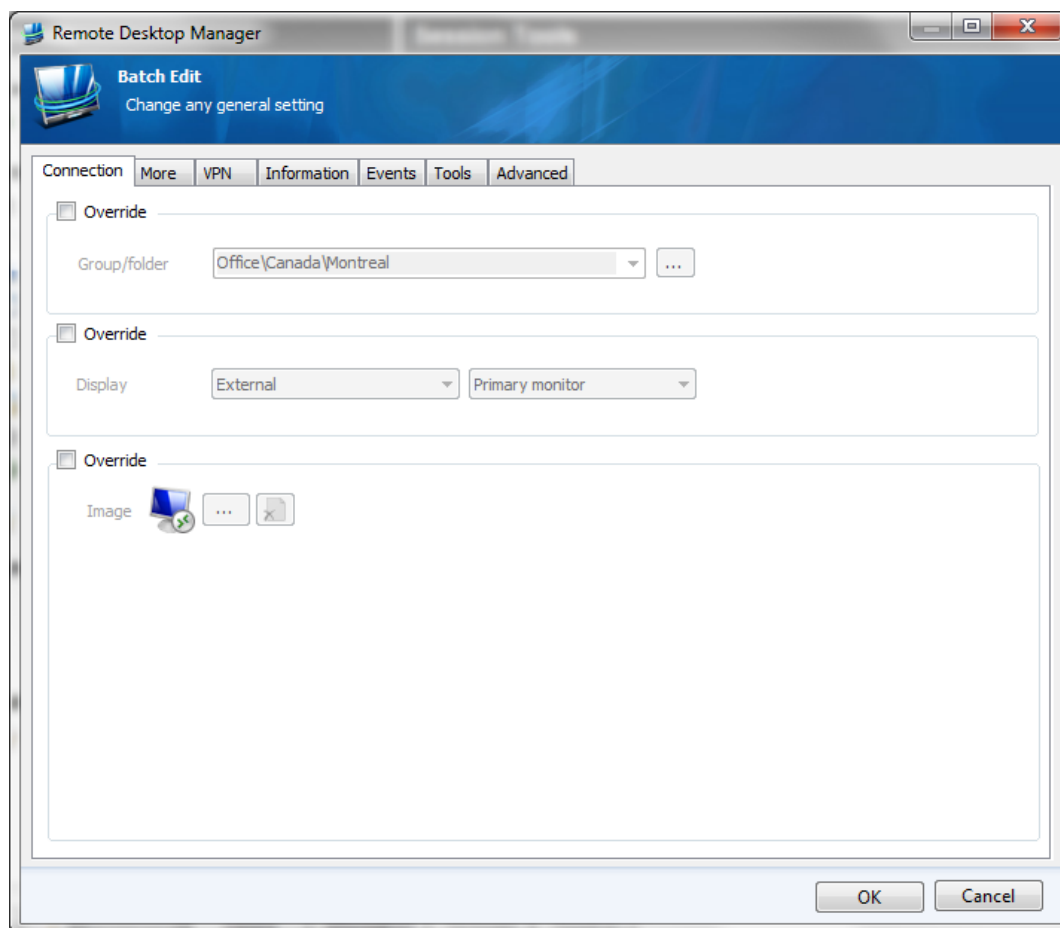
You can also change:

- The username, the domain, and/or the stored password
- Some session-specific settings (e.g. the Remote Desktop settings)
- The assigned security group (if using an advanced data source)

## General Settings

Via **Batch Edit-> Edit Sessions (General Settings)** from the context menu, you can change common session settings. The session can be of any type, because a common set of options are shared among sessions. The following general settings can be changed:

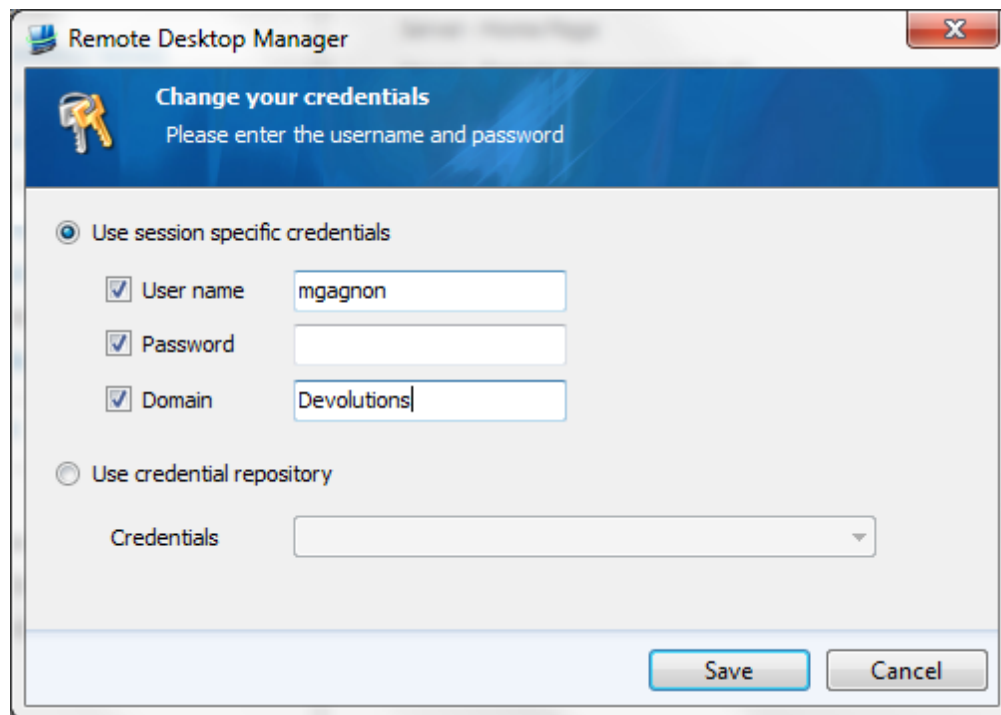
- Group
- Display
- Image
- Description
- Keywords
- Information (changed globally)
- VPN
- Events
- Log
- Tools



Batch edit - general settings dialog

## Credential Settings

You can change the configured credentials for multiple sessions in a batch. This is a good workaround for a feature not available in Password Vault Manager: inherited credentials. To change those values, use the context menu **Batch Edit-> Change Saved Credentials...**



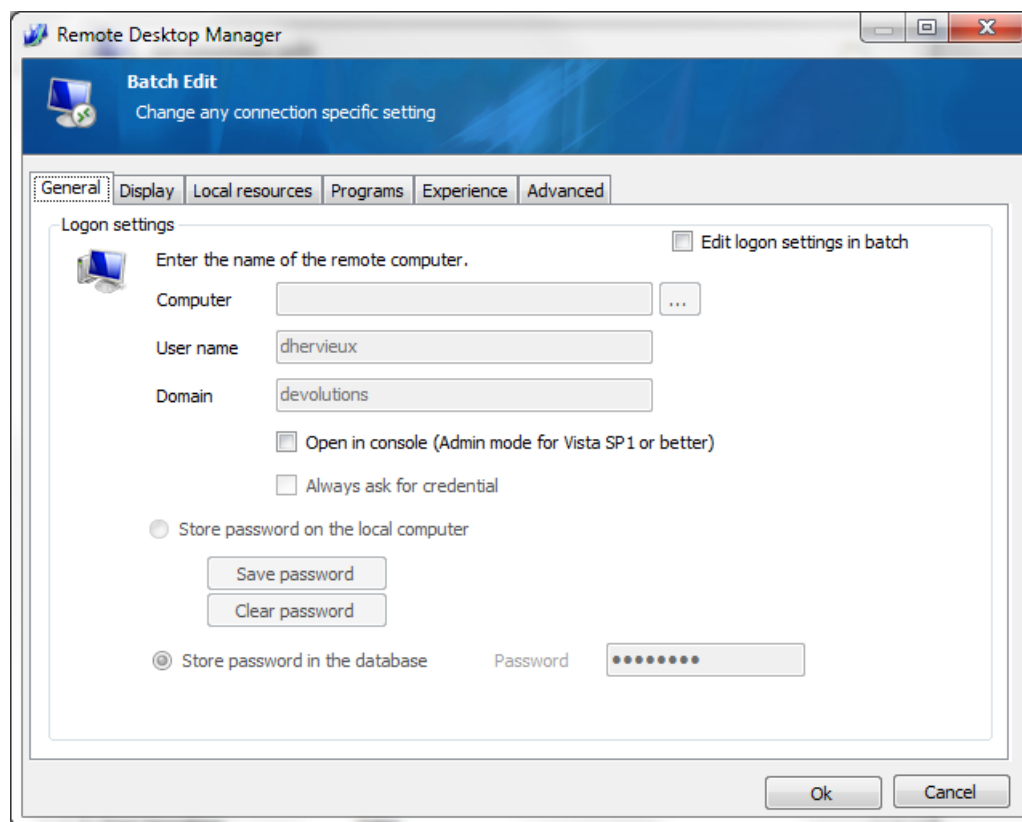
Batch edit - credential settings

Also, you can clear existing credentials (**Batch Edit-> Reset All Saved Credentials...**) or passwords (**Batch Edit-> Reset All Saved Password...**).

## Session Type Specific Settings

Some settings are specific to the selected type of session. To change these values, use the context menu **Batch Edit-> Edit Sessions (Session Type Settings)...**

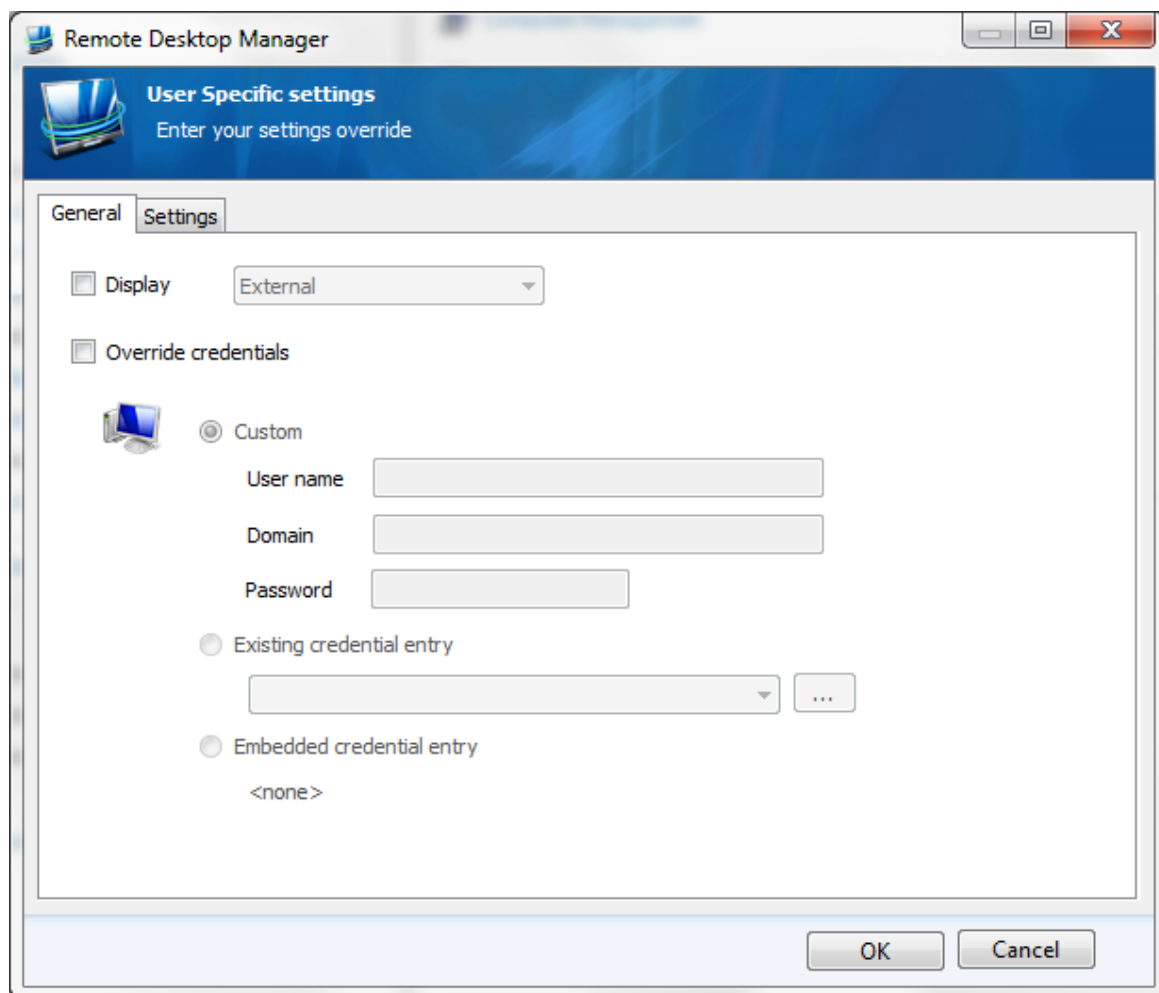




Batch edit - RDP session type settings

## User-specific Settings

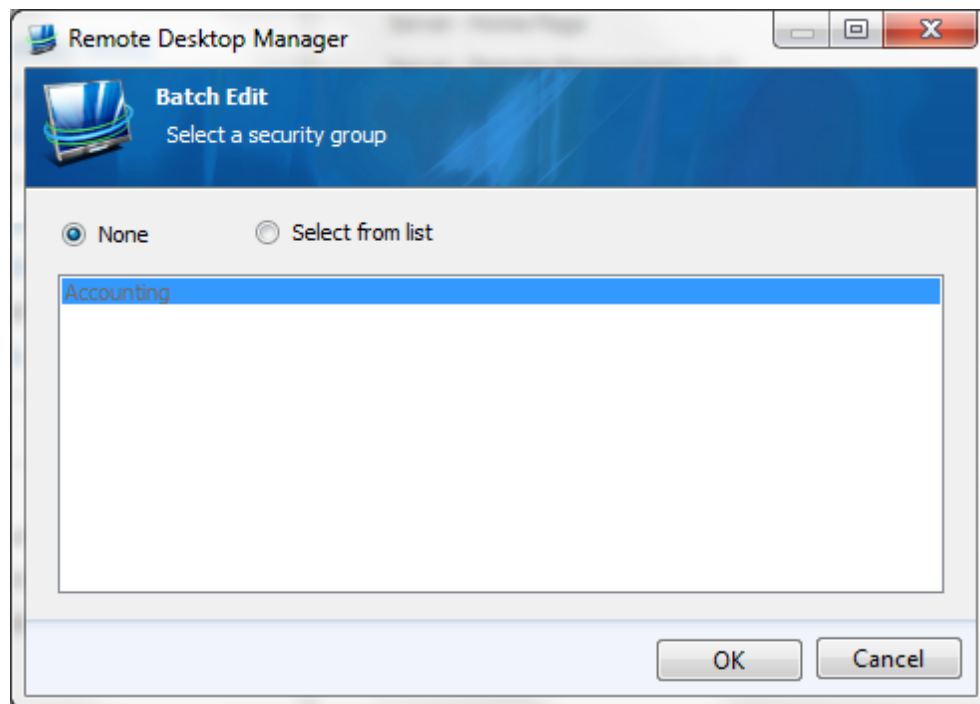
User-specific settings can be modified in a batch if they're supported by the type of session. To change user-specific sessions go to **Batch Edit-> Edit Sessions (User Settings)**...



Batch edit - user specific settings

## Security Group

To apply a new security group to multiple sessions, use the menu **Batch Edit-> Edit Sessions (Security Group)**...



Batch edit - security group

### 5.3.2 Shortcut/Linked Entries

#### Description

There are a many scenarios where it makes sense for an entry to appear more than once in the UI. For example, you might want to:

- assign different access to the folder
- create a favorite folder with everything centralized
- reuse a document for different scenario.

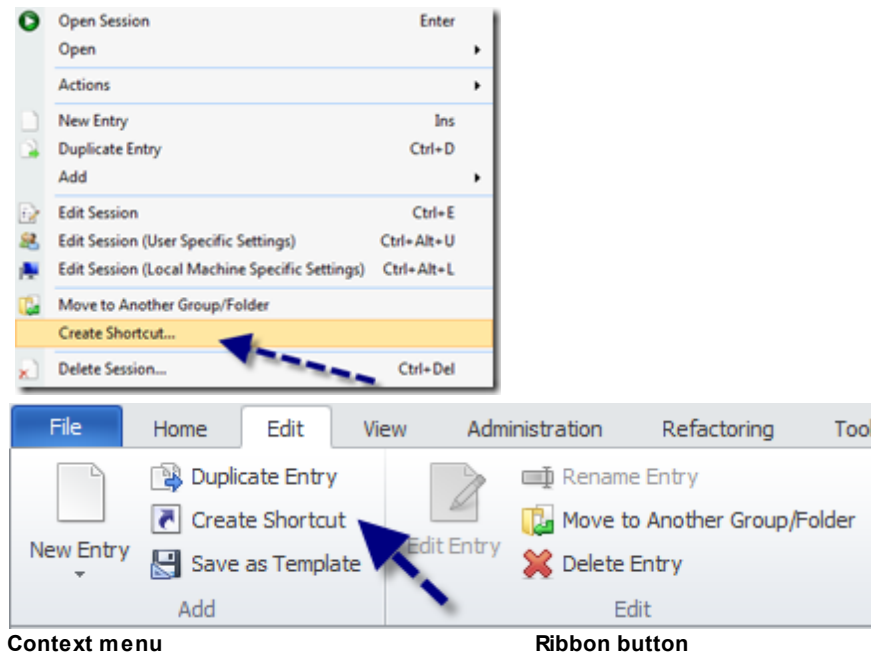


Two shortcuts selected

Creating shortcuts is simplified by saving the entry once in the database, while linking it to more than one group. So when the application loads the data, it automatically creates a link to the original entry.

#### Creating a Shortcut: Option 1

One way to create a shortcut is by using the menu **Edit->Create Shortcut...** or with the ribbon button



Context menu

Ribbon button

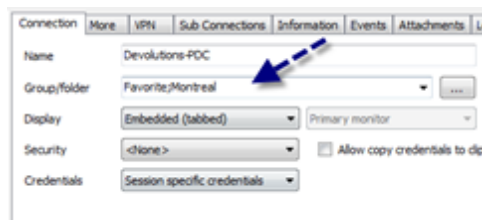
Simply choose the destination folder for the shortcut. The application will automatically refresh and display the new shortcut in the list.



There is no visual difference between the shortcut and the original entry. Therefore, you'll need to delete all entries to completely remove them.

## Creating a Shortcut: Option 2

A second way to create a shortcut is via the session properties. Since the shortcut is based on a group list, simply add a session in multiple groups by setting two or more destinations, which are separated by “;”. You can also use the browse button (...) and select more than one group by holding the Ctrl key while clicking on the tree node.



### 5.3.3 Local/User Specific Settings

#### Description

Allow for session setting override for a user or local machine. Several settings can be overridden, such as user name, password, and the default application.

#### User Specific Settings

Override default session settings with values specific to you at the opening of the session.

### **Local Machine Specific Settings**

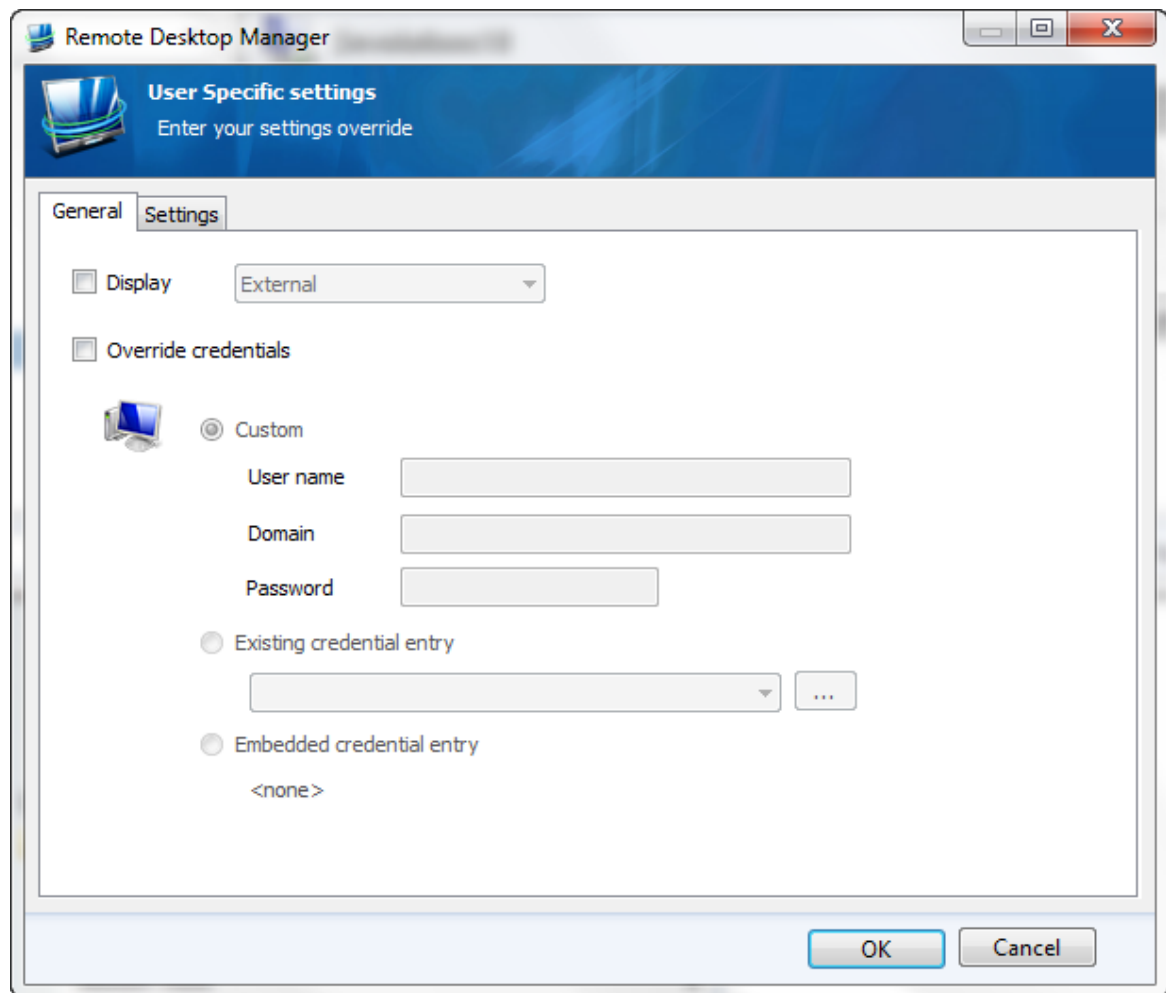
Override the default session settings with values specific to this local machine at the opening of the session.



This feature is only available when using an [Advanced Data Source](#).

▶	Open Session	Enter
	Open	▶
	Actions	▶
	New Entry	Ins
	Duplicate Entry	Ctrl+D
	Add	▶
	Edit Session	Ctrl+E
	<b>Edit Session (User Specific Settings)</b>	<b>Ctrl+Alt+U</b>
	Edit Session (Local Machine Specific Settings)	Ctrl+Alt+L
	Move to Another Group/Folder	
	Delete Session...	Ctrl+Del
	Rename Session	F2
	Status	▶
	Batch Edit	▶
	Clipboard	▶
	Execute Typing Macro	Ctrl+Alt+A
	Favorite	▶
	View	▶
	Import/Export	▶
	Session Tools	▶
	Expand All	Ctrl +
	Collapse All	Ctrl -

**User Specific Settings menu**



Available settings

## 5.3.4 Settings

### 5.3.4.1 General

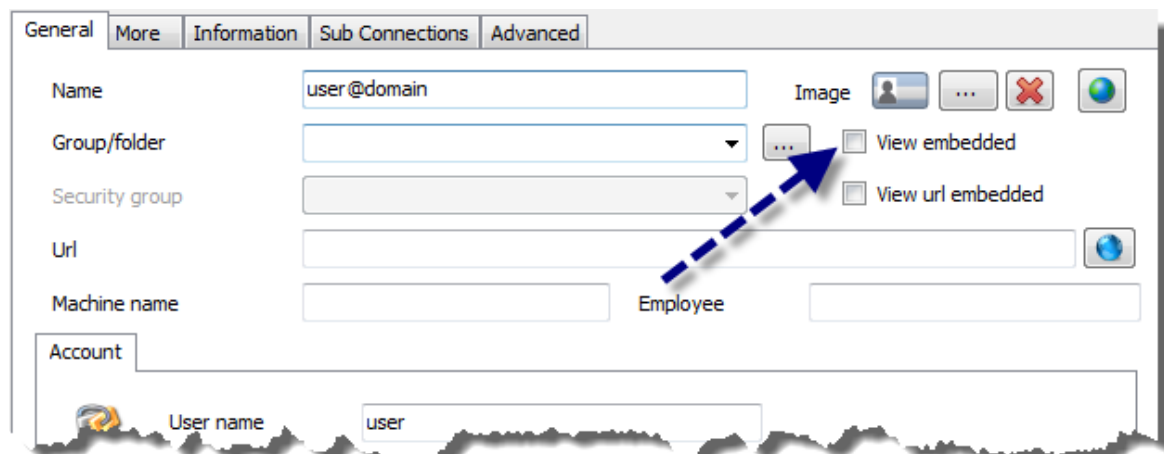
#### 5.3.4.1.1 Display Mode

#### Description

Password Vault Manager allows control on how the entry itself is displayed and on how the URL defined in the entry is viewed

#### Entry View Mode

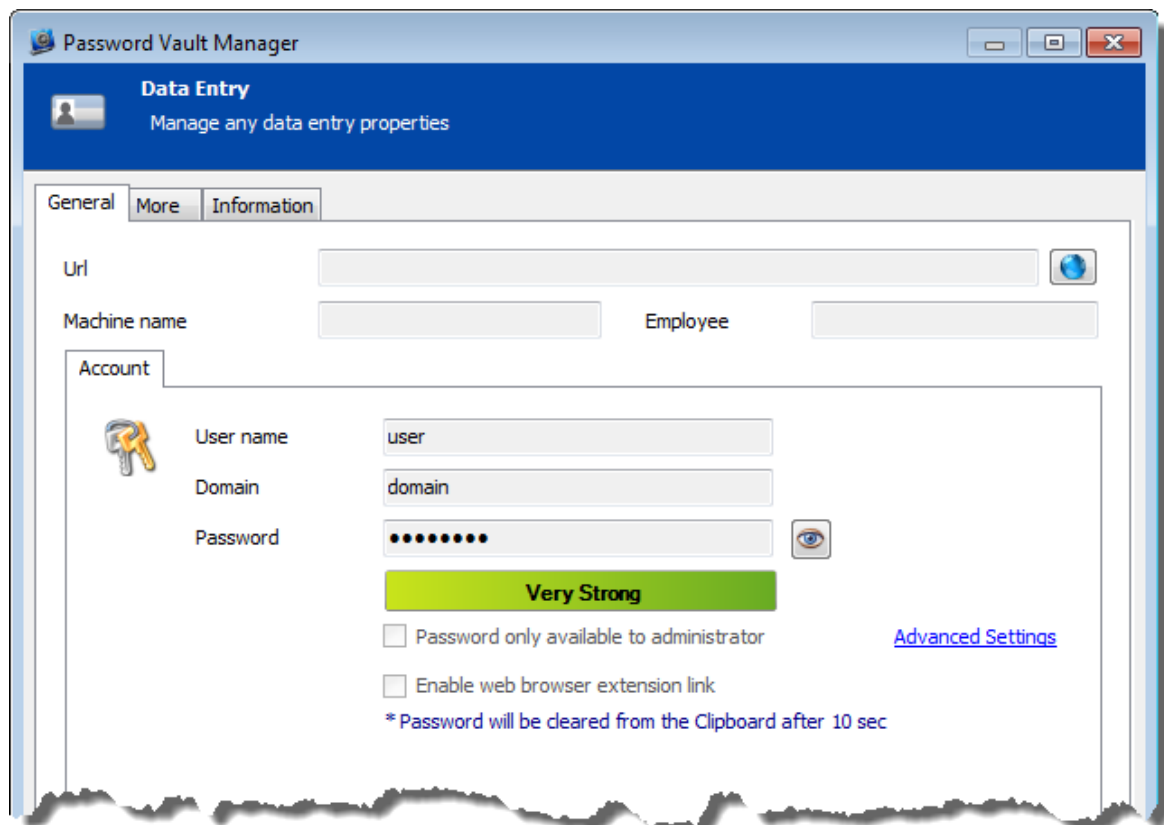
You can view the entry details in its own form, or embedded in Password Vault Manager.



The screenshot shows the 'General' tab of the Password Vault Manager interface. It contains several input fields: 'Name' (user@domain), 'Group/folder' (empty), 'Security group' (empty), 'Url' (empty), 'Machine name' (empty), 'Employee' (empty), and 'Account' (empty). There is an 'Image' section with a person icon, a '...' button, a red 'X' button, and a globe icon. Below the 'Image' section are two checkboxes: 'View embedded' and 'View url embedded', both of which are unchecked. A blue dashed arrow points from the 'View embedded' checkbox to the '...' button. At the bottom, there is a 'User name' field with the value 'user'.

Entry view mode

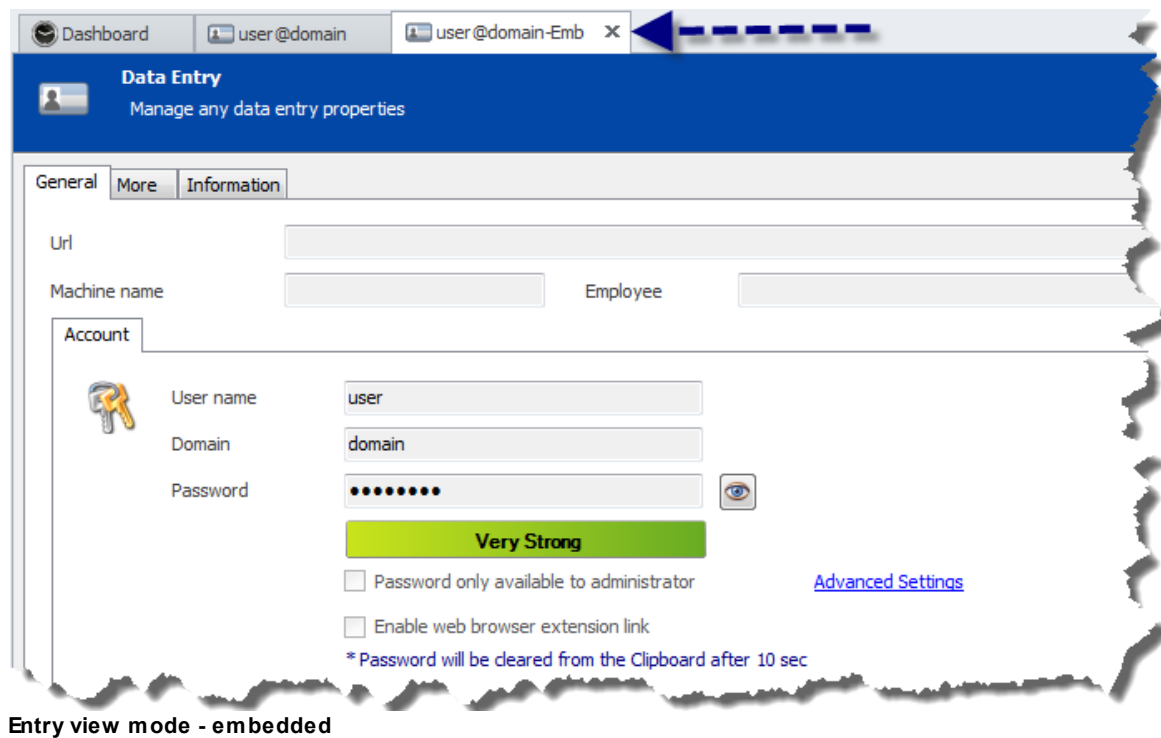
By default the setting is off, which will display the entry in its own form as can be seen here



The screenshot shows the 'Data Entry' form in the Password Vault Manager. The form has a blue header with the title 'Data Entry' and the subtitle 'Manage any data entry properties'. Below the header are three tabs: 'General', 'More', and 'Information'. The 'General' tab is selected. It contains the same input fields as the previous screenshot: 'Url', 'Machine name', 'Employee', and 'Account'. Below these fields is a 'User name' field with the value 'user', a 'Domain' field with the value 'domain', and a 'Password' field with masked characters. To the right of the 'Password' field is an eye icon. Below the password field is a green button labeled 'Very Strong'. At the bottom, there are two checkboxes: 'Password only available to administrator' and 'Enable web browser extension link', both of which are unchecked. A blue link labeled 'Advanced Settings' is also present. A note at the bottom states: '\* Password will be cleared from the Clipboard after 10 sec'.

Entry view mode - form

Enabling the "View embedded" check box will embed the view within Password Vault Manager



## URL View Mode

You can view the URL in your default browser or in an embedded tab.

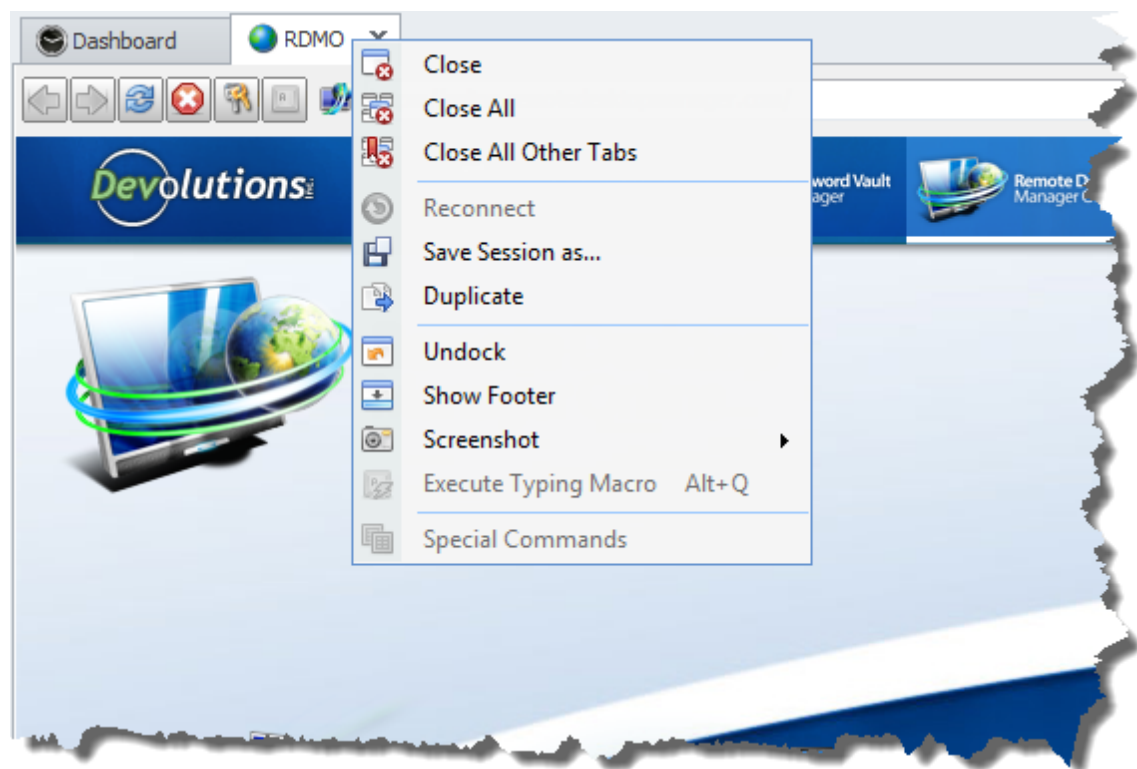
### *External browser mode*

Selecting the "View URL" command will launch your default browser for the defined URL.

### *Embedded/Tabbed Mode*

An embedded entry is displayed within the confines of the Password Vault Manager window, and displays tabs at the top of the window. This mode centralizes the opened entries inside the application window, which makes it easy to switch from one to another.

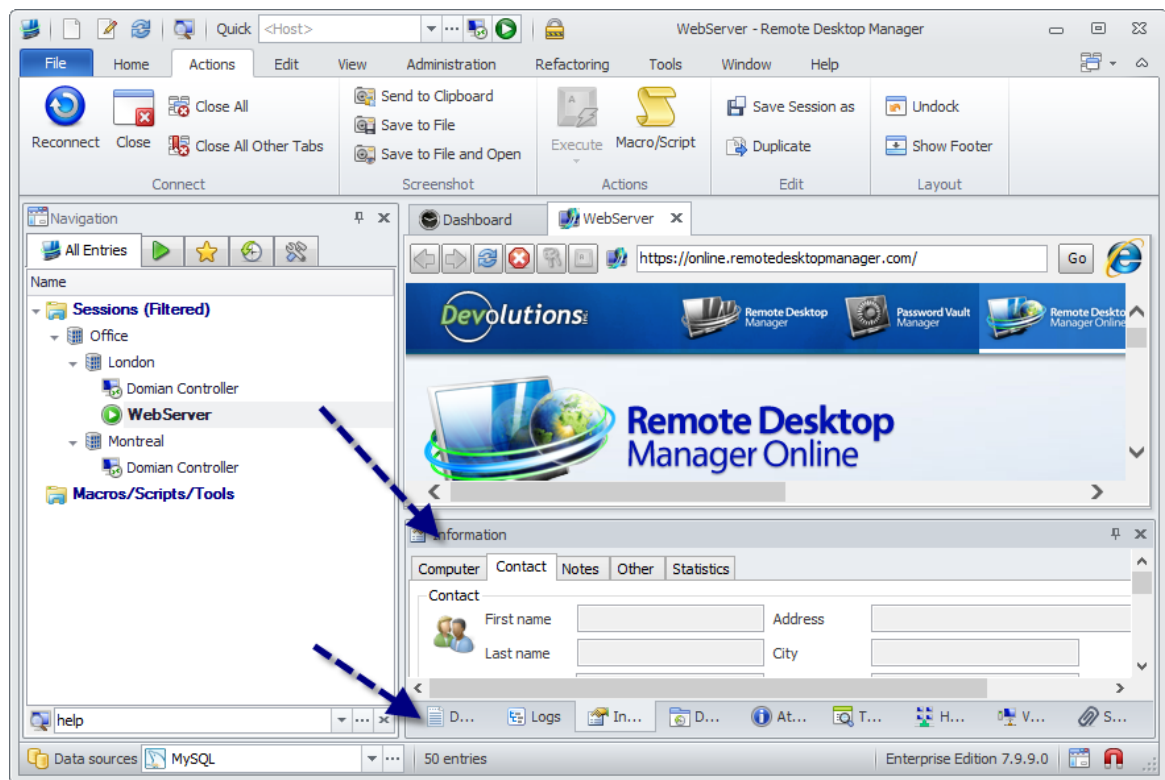




**URL View mode - embedded**

There are several entry-specific actions available by right clicking (Context Menu) on the title of the tab.

You can also show the entry footer (description, information, log, attachment, details, etc.) at the bottom of the screen, and capture a screenshot of the content.

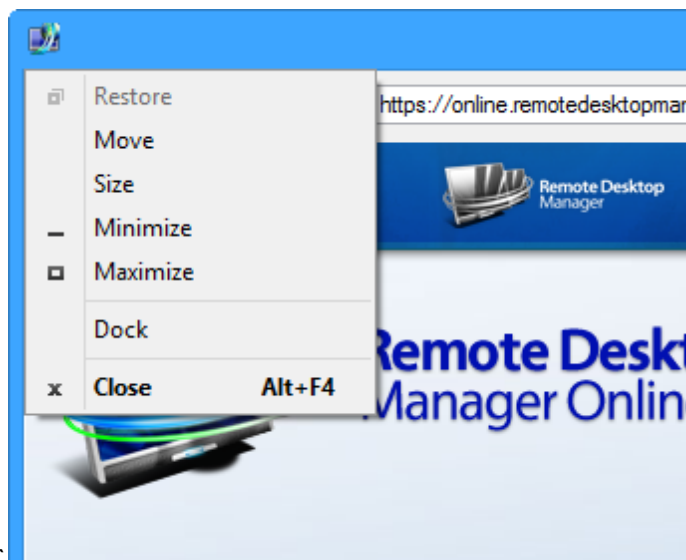


Embedded session with the footer visible

## Embedded/Tabbed Mode - Undocked

While the embedded mode is useful in some cases, you may prefer to move the content in an external window. If so, this can be easily done using the context menu. Password Vault Manager will create a new window to contain the tabbed session, and will allow you to move it anywhere else (i.e. on another screen ).

To dock the content back to its original place, use the context menu by right clicking on the window icon.

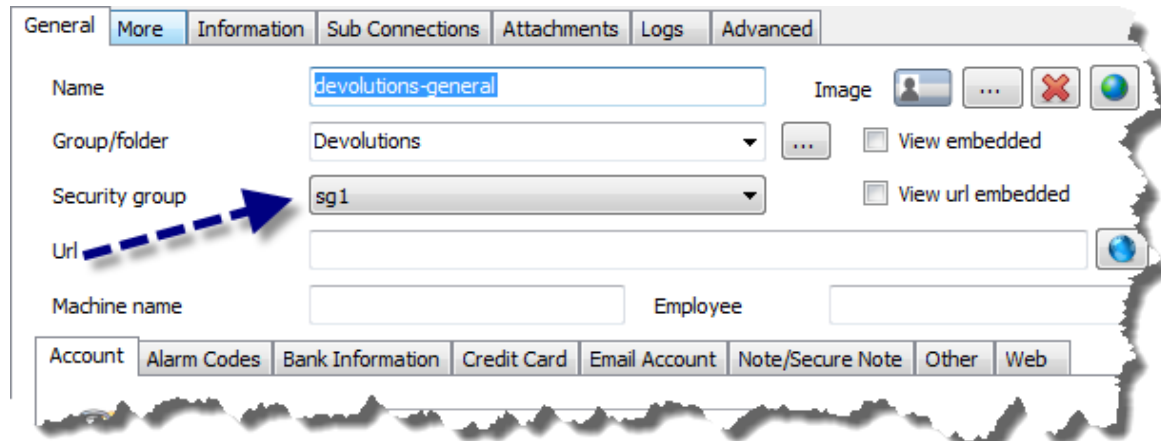


Undocked session window context menu

#### 5.3.4.1.2 Security

### Description

Assign a security group to the current entry.

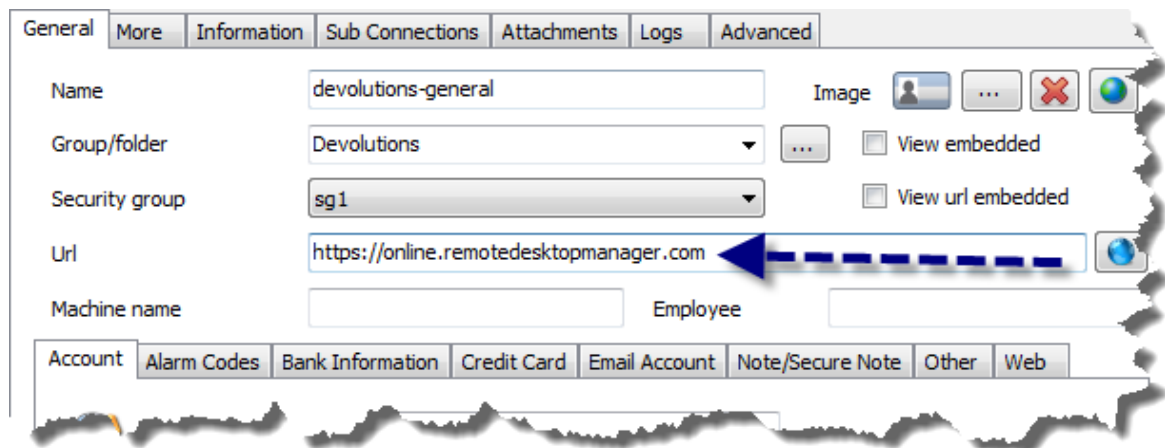


Security group

#### 5.3.4.1.3 URL

### Description

The Url property is helpful because a great number of credentials managed by Password Vault Manager are for online services.



URL Property

Using the Open URL command, either from the ribbon or from the right-click menu, will open a web browser for the specified URL.

### 5.3.4.2 More

#### 5.3.4.2.1 Description

### Description

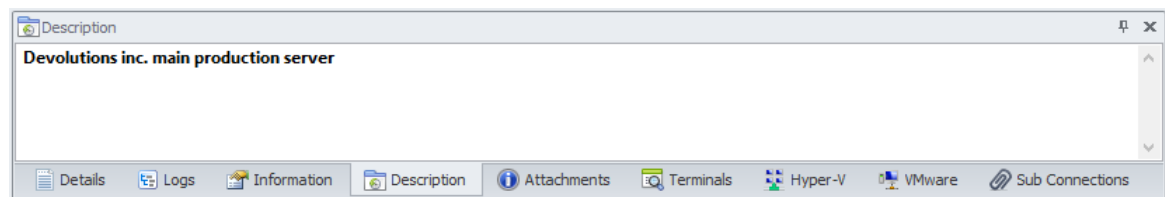
Password Vault Manager supports three description types:

- Plain text description
- Note
- External URL description

The description is displayed in **bold** on the dashboard

### Plain Text Description (Basic)

This is the most basic description, and is simply a text without formatting.



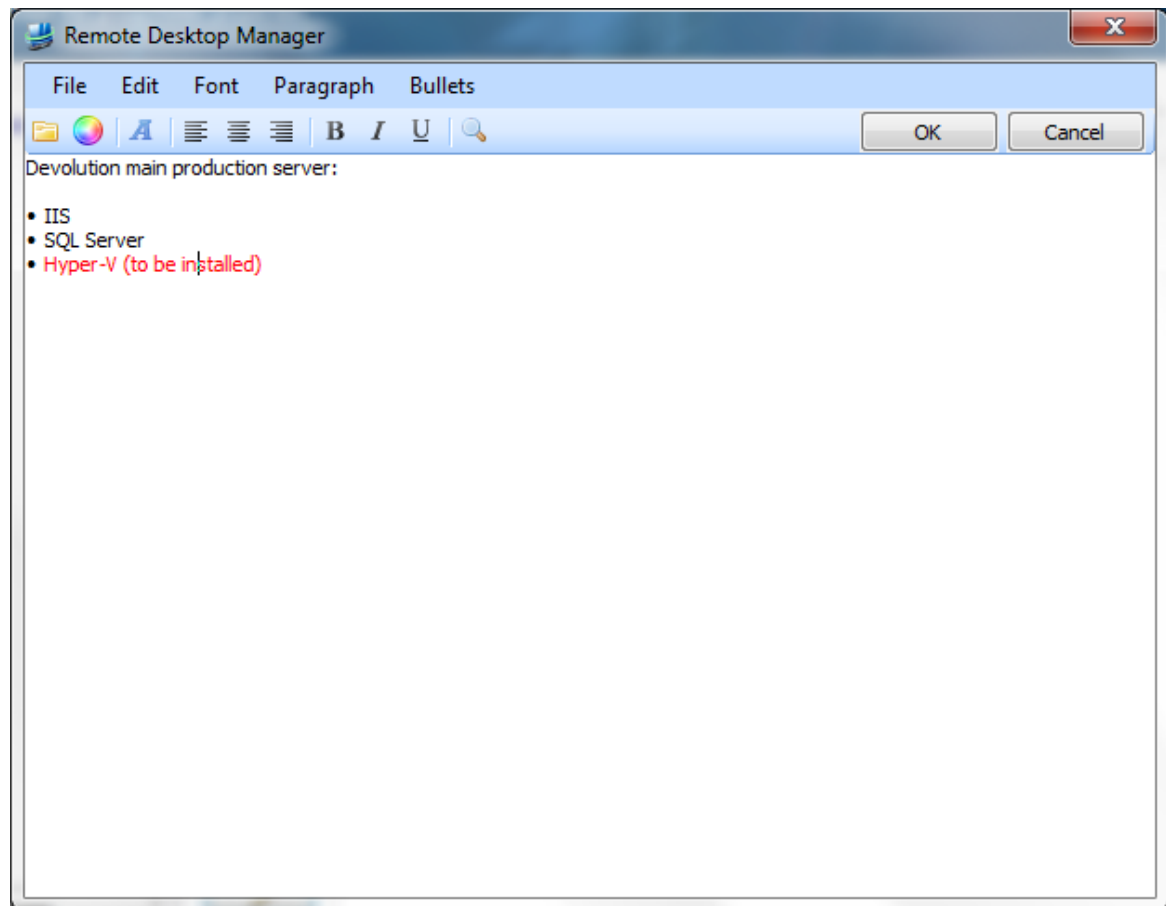
Plain text description

### Note

The RTF (Rich Text Format) description offers more formatting options, and allows you to change:

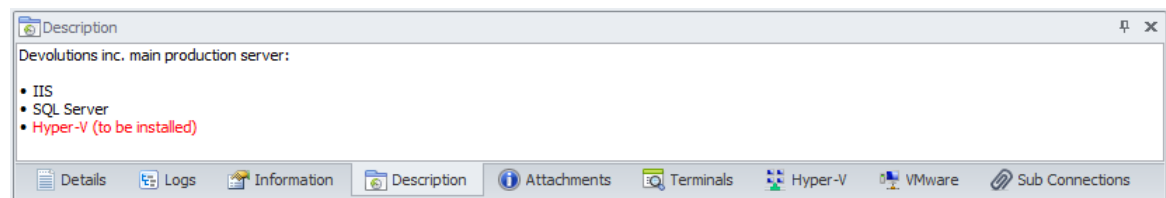
- Text color
- Font size
- Font style
- Text alignment

You can also create lists (numbered and bullets).



RTF description editor

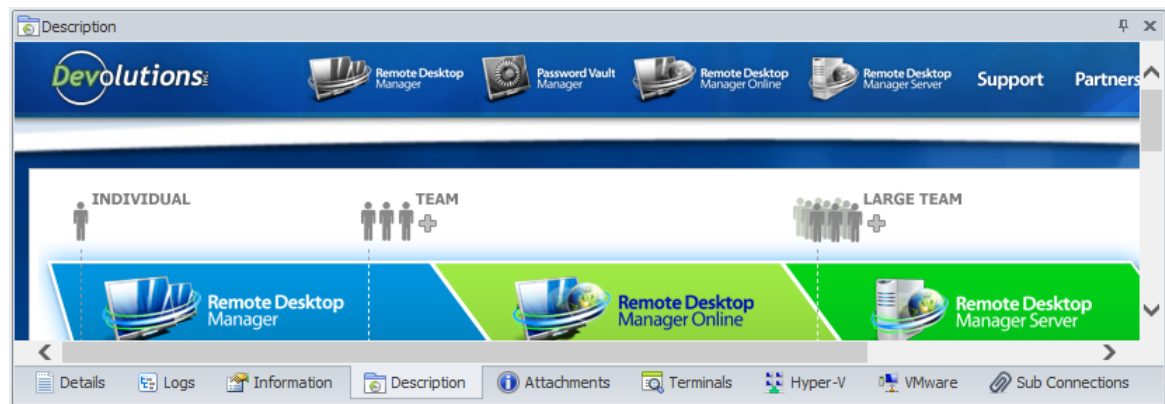
Password Vault Manager will display the description exactly the way it was formatted in the editor.



RTF text description

## External URL Description

The description may also be a link to a website (e.g. on a server in the Intranet). By using session variables (\$SESSION\_ID\$, \$SESSION\_NAME\$, etc.), the website can be generated on-the-fly as an HTML page, and its URL returned. This lets you integrate an external system or a custom application.



External URL description

#### 5.3.4.2.2 Keyw ords/Tags

### Description

Add keywords or tags to allow searching.

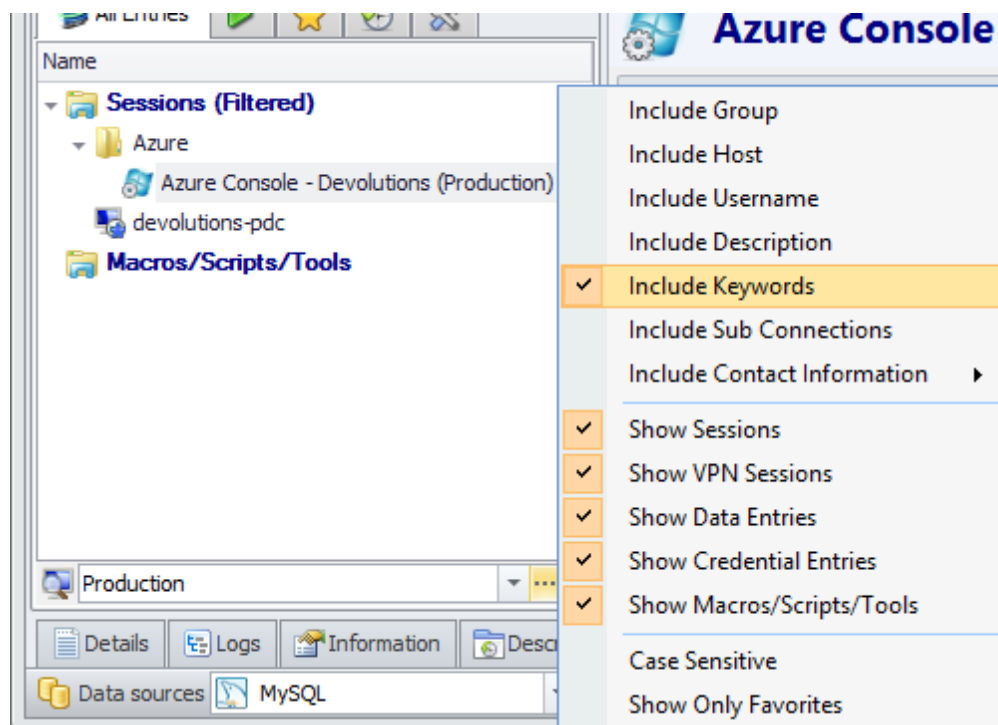
Keywords/tags

production, live

Keywords/tags

### Searching

Keywords searching must be enabled.

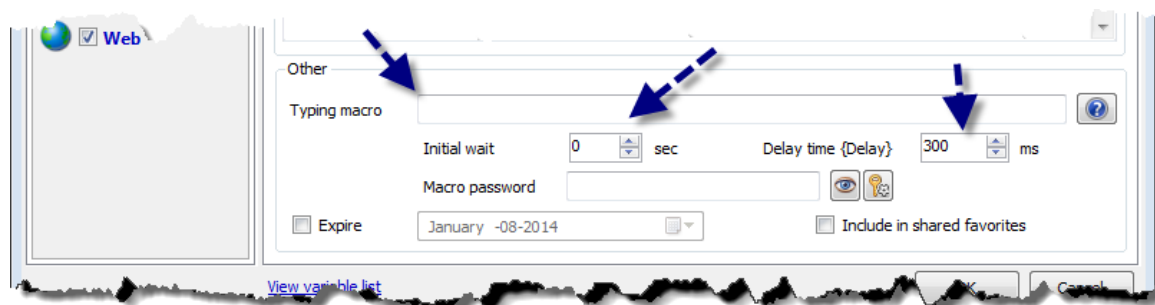


Enable keyword search

#### 5.3.4.2.3 Typing macro

### Description

The Typing Macro allows that you can launch manually a keyboard macro once a session has been established.



Auto typing macro

### Typing Macro

Each key is represented by one or more characters. To specify a single keyboard character, use the character itself. For example, to represent the letter A, pass in the string "A" to the method. To represent more than one character, append each additional character to the one preceding it. To represent the letters A, B, and C, specify the parameter as "ABC".

The initial wait setting allows you to launch the macro and then switch the focus to whatever window you'd like to run the macro in.

### *Special keys*

To specify characters that aren't displayed when you press a key, such as ENTER or TAB, and keys that represent actions rather than characters, use the codes in the following table.

Key	Code
BACKSPACE	{BACKSPACE}, {BS}, or {BKSP}
BREAK	{BREAK}
CAPS LOCK	{CAPSLOCK}
DEL or DELETE	{DELETE} or {DEL}
DOWN ARROW	{DOWN}
END	{END}
ENTER	{ENTER}
ESC	{ESC}
HELP	{HELP}
HOME	{HOME}
INS or INSERT	{INSERT} or {INS}
LEFT ARROW	{LEFT}
NUM LOCK	{NUMLOCK}
PAGE DOWN	{PGDN}
PAGE UP	{PGUP}
PRINT SCREEN	{PRTSC}
RIGHT ARROW	{RIGHT}
SCROLL LOCK	{SCROLLLOCK}
TAB	{TAB}
UP ARROW	{UP}
F1	{F1}
F2	{F2}
F3	{F3}
F4	{F4}
F5	{F5}
F6	{F6}
F7	{F7}
F8	{F8}
F9	{F9}
F10	{F10}
F11	{F11}



F12	{F12}
F13	{F13}
F14	{F14}
F15	{F15}
F16	{F16}
Keypad add	{ADD}
Keypad subtract	{SUBTRACT}
Keypad multiply	{MULTIPLY}
Keypad divide	{DIVIDE}

To specify keys combined with any combination of the SHIFT, CTRL, and ALT keys, precede the key code with one or more of the following codes.

Key	Code
SHIFT	+
CTRL	^
ALT	%

To specify that any combination of SHIFT, CTRL, and ALT should be held down while several other keys are pressed, enclose the code for those keys in parentheses. For example, to specify to hold down SHIFT while E and C are pressed, use "+(EC)". To specify to hold down SHIFT while E is pressed, followed by C without SHIFT, use "+EC".

### **Special commands**

Commands	Description
{DELAY}	This command introduces a small delay of 300 ms (default value) before the next command.
{WINDOW:???	This command focus a window containing the specified name after the semi colon.
{PREV-WINDOW}	Select the previous window before executing the remaining commands.

### **Macro Password**

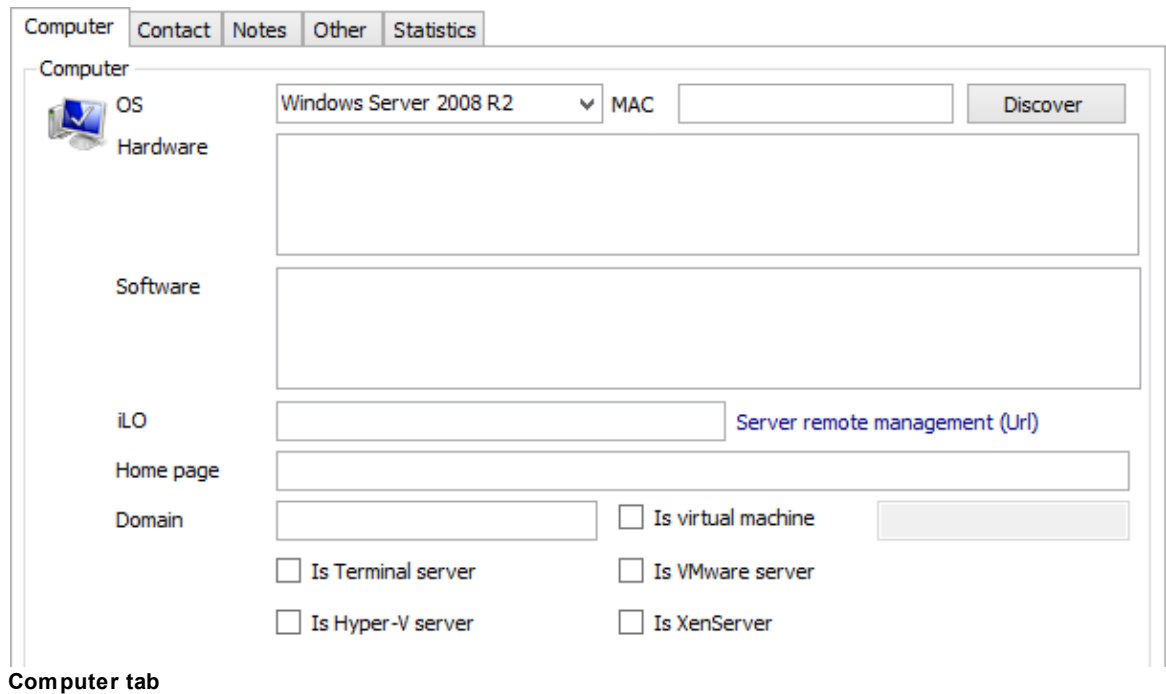
You can define a password that is to be used within the typing macro exclusively. Use the variable **\$MACRO\_PASSWORD\$** to access the password.

### 5.3.4.3 Information

#### 5.3.4.3.1 Computer

#### Description

The computer tab allows you to specify computer specific information such as operating system & MAC address. In Password Vault Manager this is only informational.



The screenshot shows the 'Computer' tab selected in the Password Vault Manager interface. The tab is part of a group including 'Contact', 'Notes', 'Other', and 'Statistics'. The 'Computer' tab contains a sidebar with a computer icon and labels for 'OS', 'Hardware', 'Software', 'iLO', 'Home page', and 'Domain'. The main area has a dropdown menu for 'OS' set to 'Windows Server 2008 R2', a 'MAC' label, a text input field, and a 'Discover' button. Below these are large empty text areas for 'Hardware' and 'Software'. The 'iLO' section has a text input field and a link 'Server remote management (Url)'. The 'Home page' section has a text input field. The 'Domain' section has a text input field and a 'Is virtual machine' checkbox. Below this are four checkboxes: 'Is Terminal server', 'Is Hyper-V server', 'Is VMware server', and 'Is XenServer'.

Computer tab

#### 5.3.4.3.2 Contact

#### Description

The contact tab allows you to enter contact information for a given session. Very useful when you are managing third party servers.

The screenshot shows a software interface with a tabbed menu at the top. The 'Contact' tab is active. Below the tabs is a form titled 'Contact' with a small icon of two people. The form has two columns of input fields. The left column contains: First name, Last name, Company, Customer #, Prefix (with a dropdown arrow), Title, Email, Phone, and Fax. The right column contains: Address, City, State, Zip code, Country (with a dropdown arrow), and Skype. At the bottom right of the form are two buttons: 'Email Contact' (with an envelope icon) and 'Call (Skype)' (with a Skype 'S' icon).

Contact tab

## Settings

Enter the information as needed.

### *Email contact*

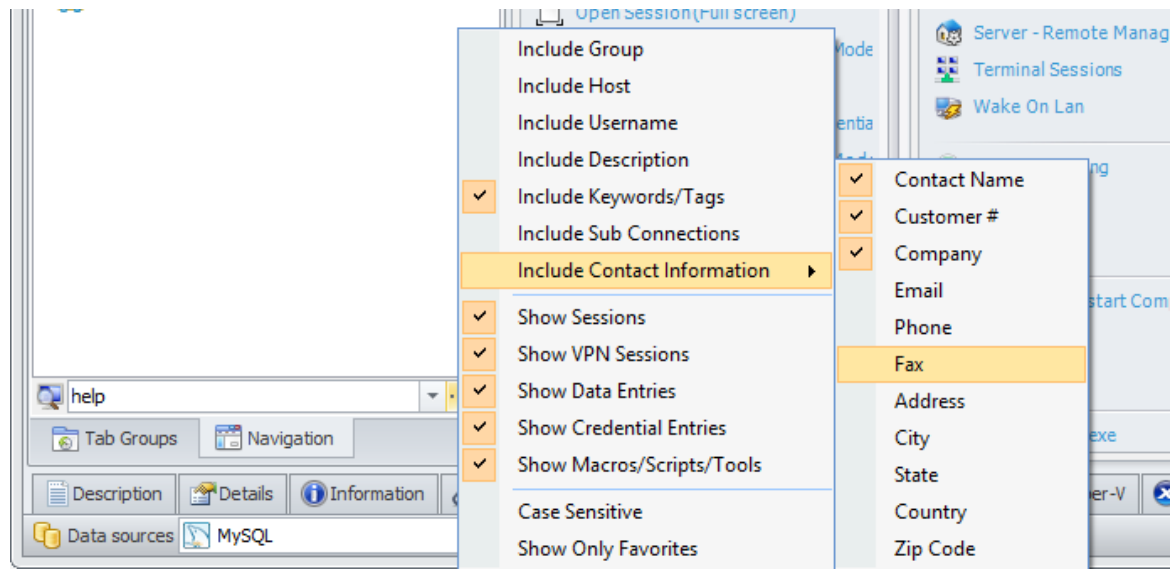
If the email field is filled out, the Email Contact button will be enabled. This will initiate a new email to the contact.

### *Call (Skype)*

If the Skype field is filled out, the Call (Skype) button will be enabled. This will launch Skype and attempt to establish a connection to the identifier you've entered.

## Searching

Most information on this tab can be enabled for searching. Please refer to [Search/Filter](#)



Search options menu, click on ... button.

#### 5.3.4.3.3 Custom Fields

### Description

Custom fields allow for defining custom properties and values that can then be access via variables (\$CUSTOM\_FIELD1\$, \$CUSTOM\_FIELD2\$, etc.) in child connections or Macros/Scripts/Tools.

Custom field 1, 2 & 3 can be encrypted for enhanced security. When used with an advanced data source users must have reveal password capabilities to be able to decrypt and view the value.



The current user must be an administrator or have reveal password privileges to see protected values.

The screenshot shows a software interface with a tabbed menu at the top containing 'Computer', 'Contact', 'Notes', 'Other', and 'Statistics'. The 'Other' tab is selected. Below the tabs, there is a section titled 'Custom fields'. To the left of this section is a small icon of a document with a checkmark. The 'Custom fields' section contains five entries, each with a blue hyperlink label and a corresponding text input field to its right. The labels are 'Custom #1', 'Custom #2', 'Custom #3', 'Custom #4', and 'Custom #5'. The input fields for 'Custom #1', 'Custom #2', and 'Custom #3' are short, while the fields for 'Custom #4' and 'Custom #5' are significantly larger and include vertical scrollbars. To the right of each input field is a small, empty square checkbox.

Other tab

## Settings

The field can be renamed to your liking, just click on the hyperlink to display a dialog to enter a new name.

Encryption of Custom Fields 1,2 and 3 are controlled by these check boxes

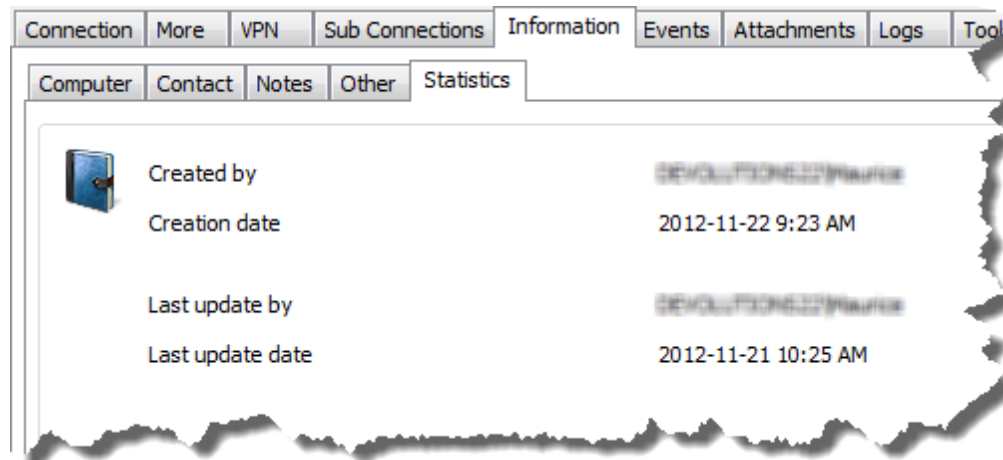
This screenshot is similar to the one above, showing the 'Other' tab and the 'Custom fields' section. However, in this view, the input fields for 'Custom #1', 'Custom #2', and 'Custom #3' are replaced by blue dashed arrows pointing to the right. Each arrow points to a small square checkbox, which is currently unchecked. The 'Custom #4' field and its associated scroll bar are still visible at the bottom of the list.

Field encryption check boxes

5.3.4.3.4 Statistics

## Description

The statistics tab simply displays some information on the creation and last modification of the entry.



Statistics Tab

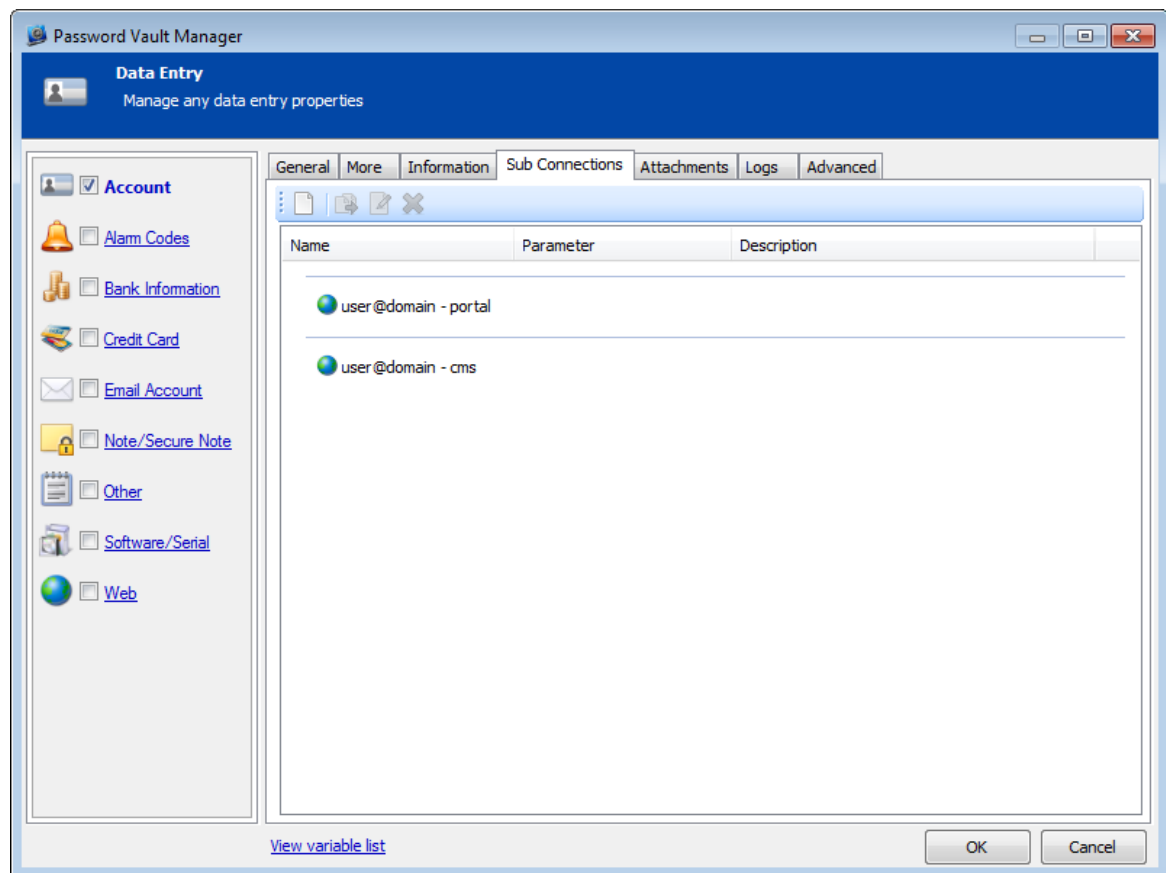
#### 5.3.4.4 Sub Connections

##### 5.3.4.4.1 Overview

### Description

Sub connections are used to share properties between groups of entries (e.g. the URL). They're also used to regroup many entry types for a computer.

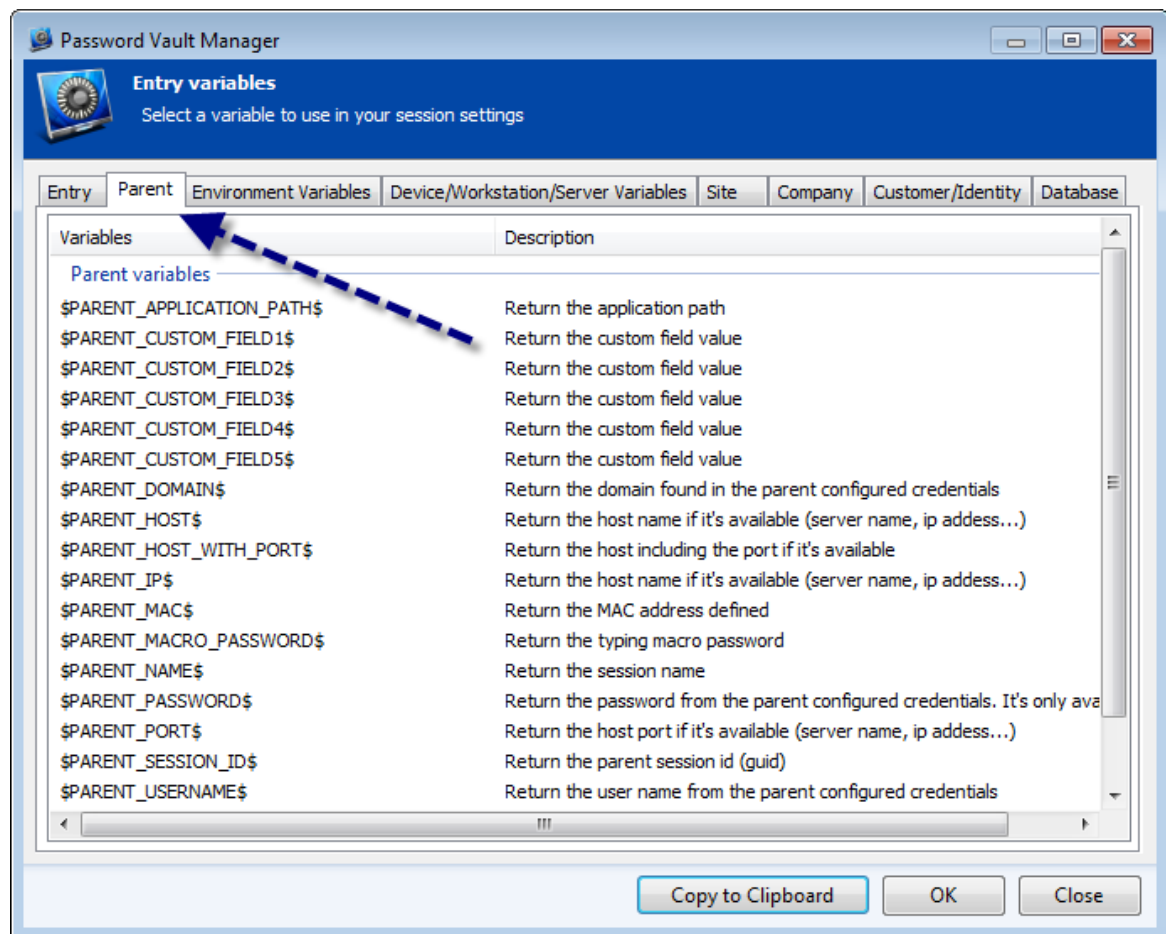
Sub connections are configured in the parent connection in the **Sub Connections** tab page. Use the predefined variables in the child session to get access to the parent settings. The most common usage is to reuse the host name and credentials from the parent within the sub connection.



Sub connections tab page

## Using variables

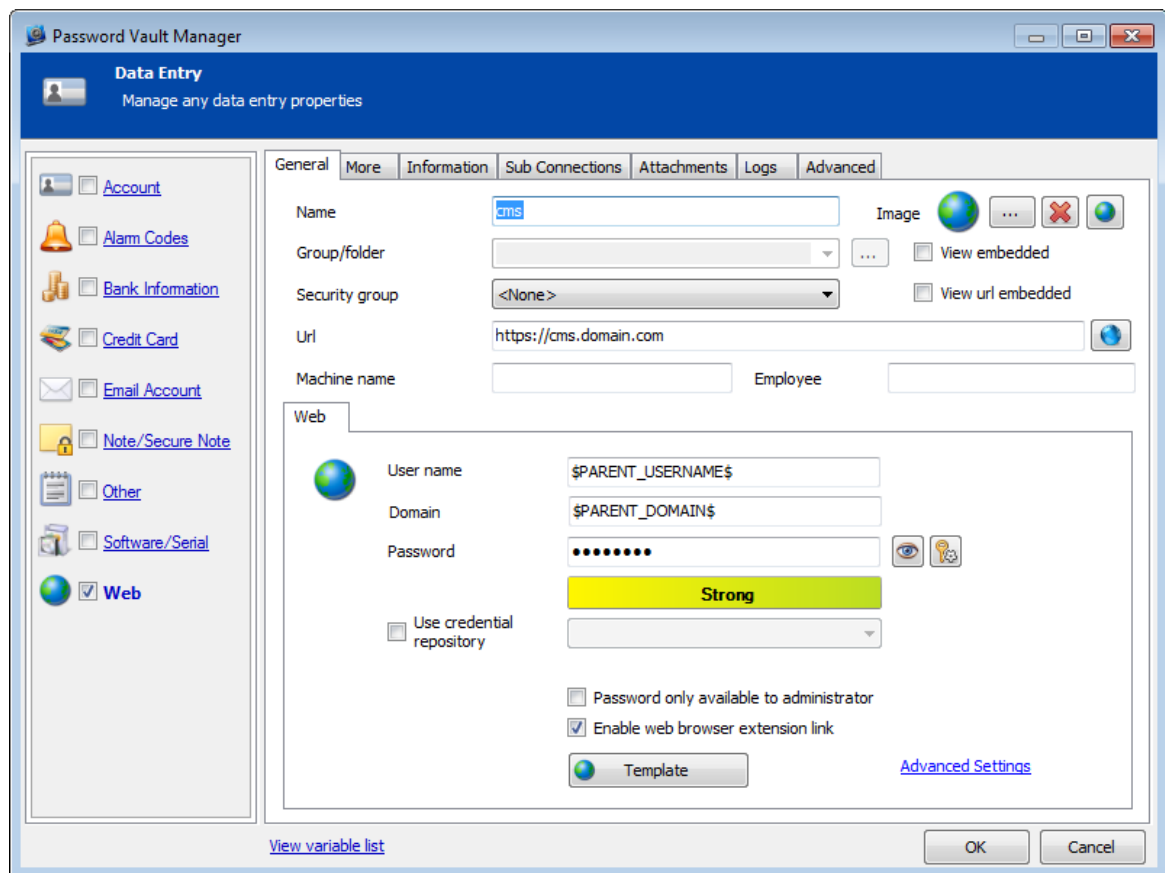
When in the context of a sub connection, the Variable list contains an extra tab entitled **Parent**



Entry variables - Parent tab

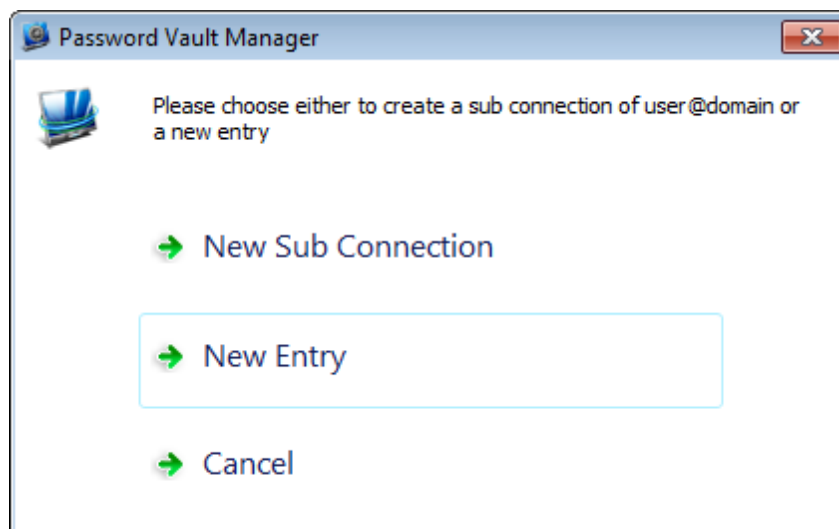
Setting the focus in a field and clicking on the **View Variable list** link will result in your chosen variable to be pasted in the field.





## Commands to create sub connections

Sub connections can also be added/created by first selecting a parent connection then with a simple right-click **Add** -> **Add...** or **Edit** -> **New Entry**. You will be prompted with the following dialog:



New connection dialog.

### 5.3.4.5 Attachments

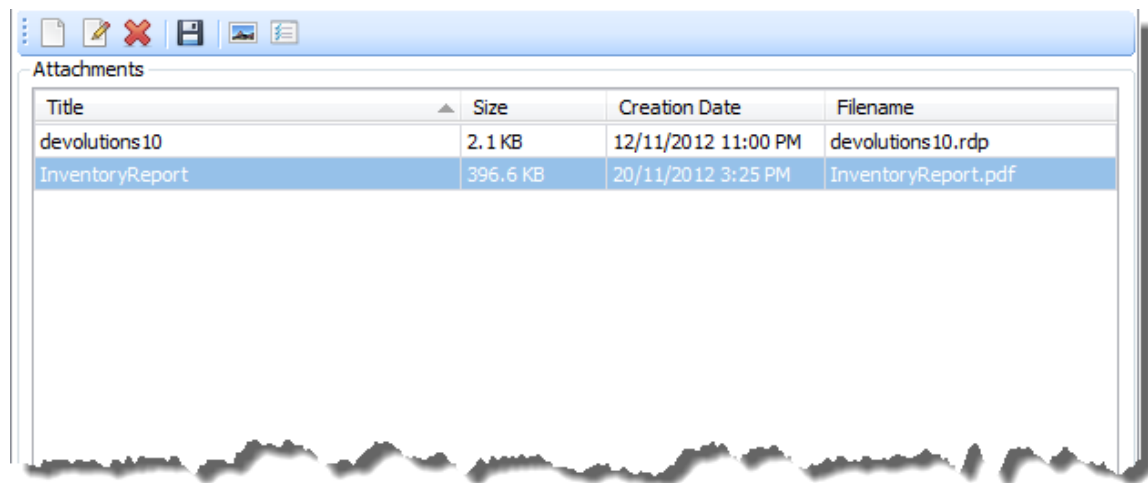
#### 5.3.4.5.1 Overview

## Description



This feature requires an advanced data source such as [MSSQL](#) & [MySQL](#). See [Advanced Data Sources](#) for more information.

Users you can add an attachments to sessions. The file is stored in the data source subsystem (database or the like).



Title	Size	Creation Date	Filename
devolutions10	2.1 KB	12/11/2012 11:00 PM	devolutions10.rdp
InventoryReport	396.6 KB	20/11/2012 3:25 PM	InventoryReport.pdf

Attachment list

The attachment can be any type and any size, depending on your bandwidth and data source limitations. You can also view a saved attachment from: the entry context menu, the entry properties, or directly from the dashboard.

### 5.3.4.6 Logs

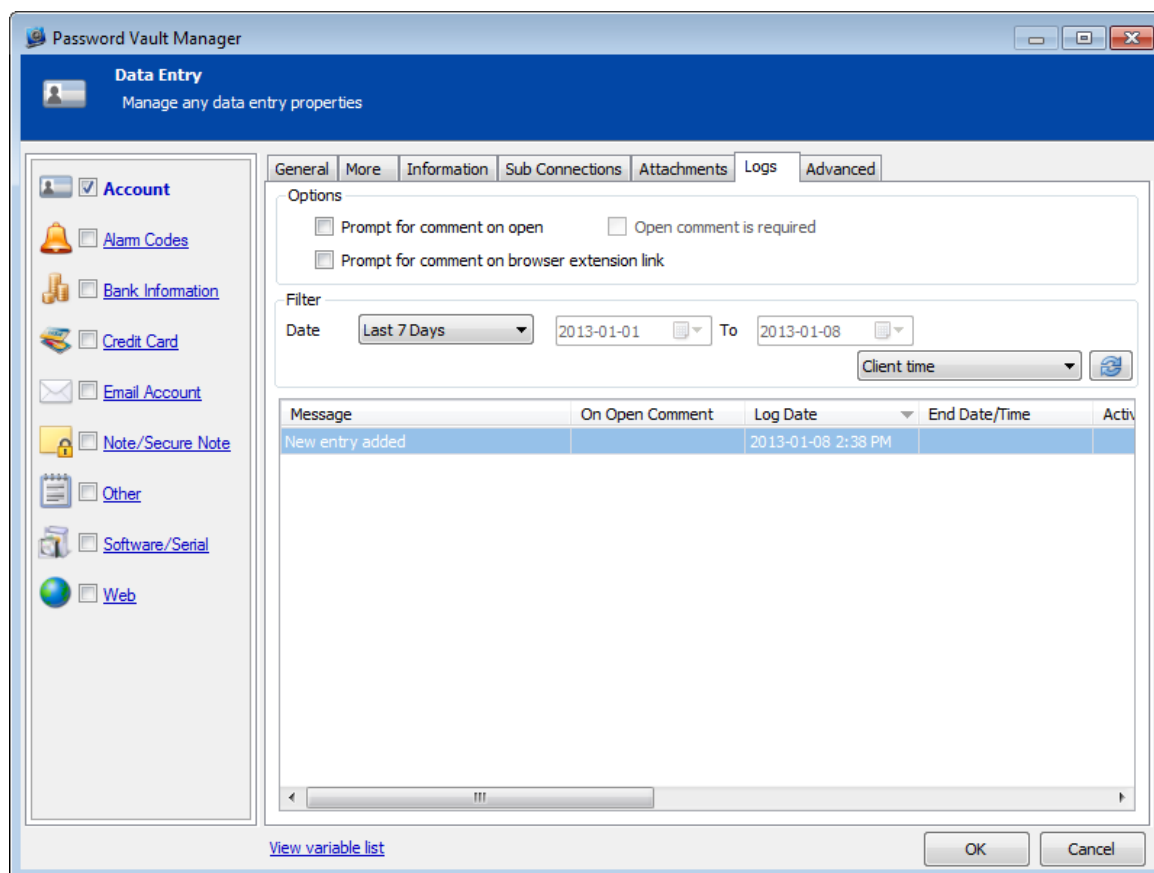
#### 5.3.4.6.1 Options

## Description



This feature requires an advanced data source such as [MSSQL](#) & [MySQL](#). See [Advanced Data Sources](#) for more information.

The Logs tab allows you to define comment requirements when a session opened/closed with the option to make comments required.



Logs tab

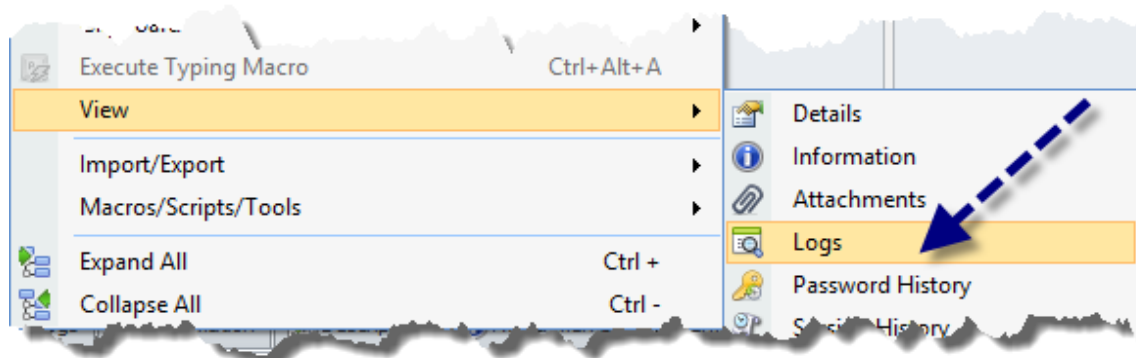
## 5.3.4.6.2 View Logs

## Description



This feature requires an advanced data source such as [MSSQL](#) & [MySQL](#). See [Advanced Data Sources](#) for more information.

Allows for viewing session activity logs. The log viewer displays information about session activity. Things like open session durations, open/close comments, user who performed the action & action time.



**Right-click View -> Logs**

Message	On Open Comment	Log Date	End Date/Time	Active Time	Duration	On Close
Open session		10/30/2012 2:11 PM	10/30/2012 2:11 PM	3 sec	9 sec	
Open session		10/30/2012 2:11 PM	10/30/2012 2:11 PM	13 sec	26 sec	
Entry edited		10/30/2012 2:11 PM				
Open session		10/30/2012 2:10 PM	10/30/2012 2:10 PM	9 sec	8 sec	
Password history was revealed		10/30/2012 1:44 PM				
Password history was revealed		10/30/2012 1:43 PM				
Password history was revealed		10/30/2012 1:43 PM				
Entry edited		10/30/2012 1:43 PM				
Entry edited		10/30/2012 1:21 PM				
New entry added		10/30/2012 1:20 PM				
Entry deleted		10/30/2012 1:20 PM				
Entry edited		10/30/2012 1:20 PM				
Entry edited		10/30/2012 1:19 PM				
New entry added		10/30/2012 9:49 AM				

**Log viewer****5.3.4.7 Advanced**



## 5.3.4.7.1 Overview

**Description**


The advanced tab has some more advanced entry options.

General More Information Sub Connections Attachments **Logs** Advanced

**Miscellaneous**

Sort priority    The default sorting priority is 0. Change this value to a greater value to show the session before others in the list/tree view.

☐ Embedded footer visible


Default action   ☒ Show in trayicon


**Internal information**

Data Source ID

Session ID

TIP: Use these parameters to invoke Remote Desktop Manager in command line.



Command line  

Advanced tab

## Miscellaneous

Feature	
Sort priority	Controls where the entry will reside within the sorted list/tree view.
Embedded footer visible	On open entry footer will be visible
Default action	Defines the action that is executed when you double click on the entry.
Show in trayicon	Indicates if the entry is listed in the trayicon context menu.

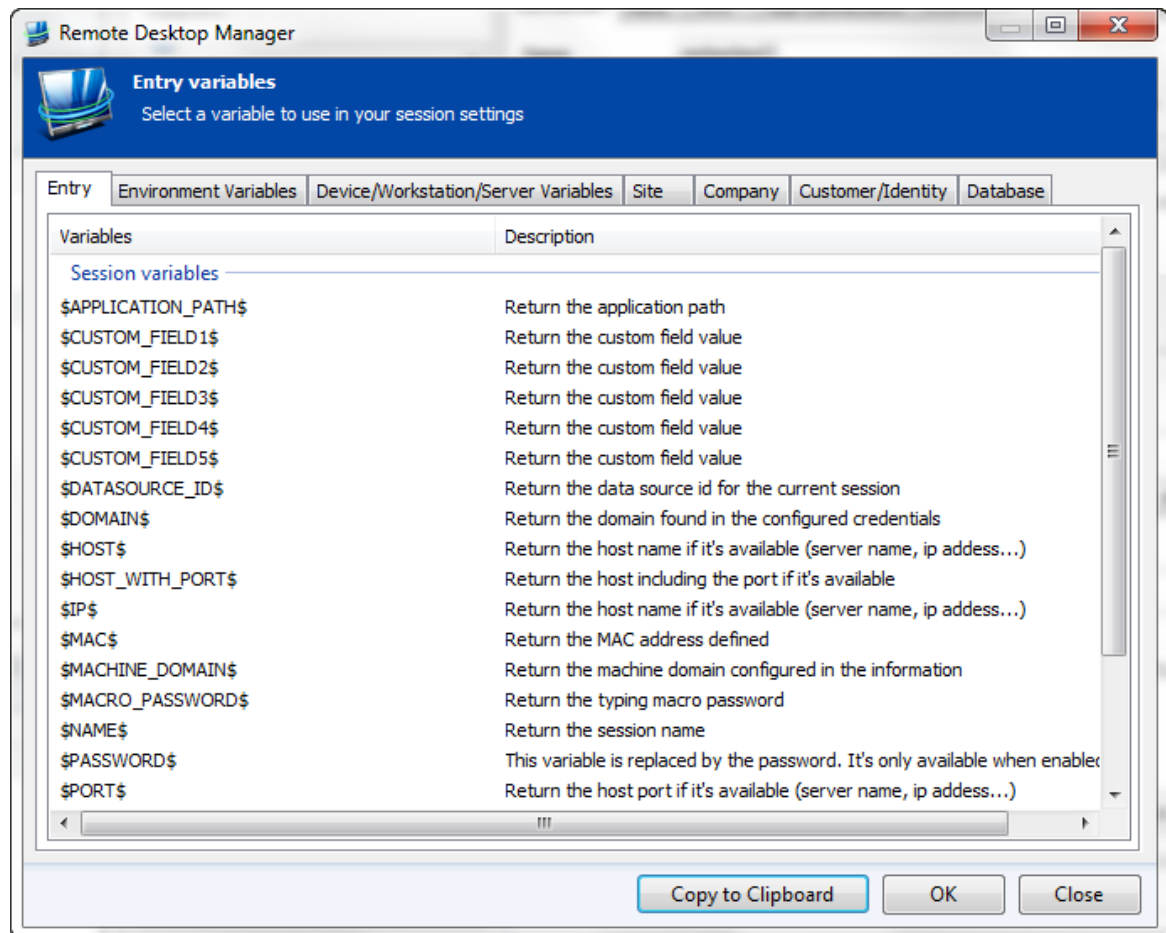
## Internal information (Command line)

Feature	
Data Source ID	Internal RDM data source ID.
Session ID	Internal RDM session ID.
Command line	Fully defined command line to start this session via command line. Hit the copy button to copy the entire command line.
Create Desktop Shortcut	Automatically create a desktop shortcut.

### 5.3.5 Variables

#### Description

Session variables can be used in any session configuration, or with any templates. They will be replaced by their corresponding values just prior to a connection. They provide greater value when used with a session related to a parent (sub connection). You can select a variable by double clicking it directly in the dialog. Please note that variables are case-sensitive they are UPPERCASE.



Session variable dialog



Use the custom field in your variables to pass any other parameters.



**\$QUICK\_CONNECT\$:** This variable is used as a placeholder for the quick connect combo box value.



**\$PASSWORD\$:** For security reason, this is only available with the command line session type and some specific types.

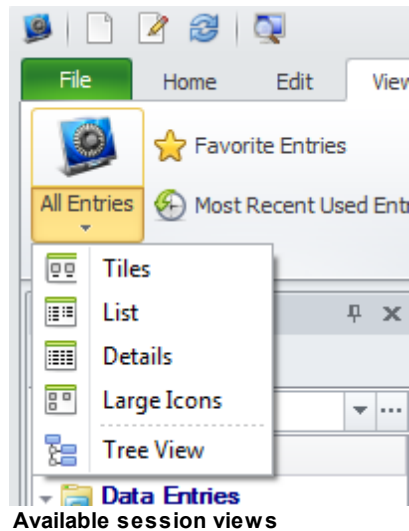
## 5.4 View

### 5.4.1 Navigation

#### 5.4.1.1 All Entries

#### Description

This is the default view, and lists all existing entries. The visual structure can be a list or tree view.

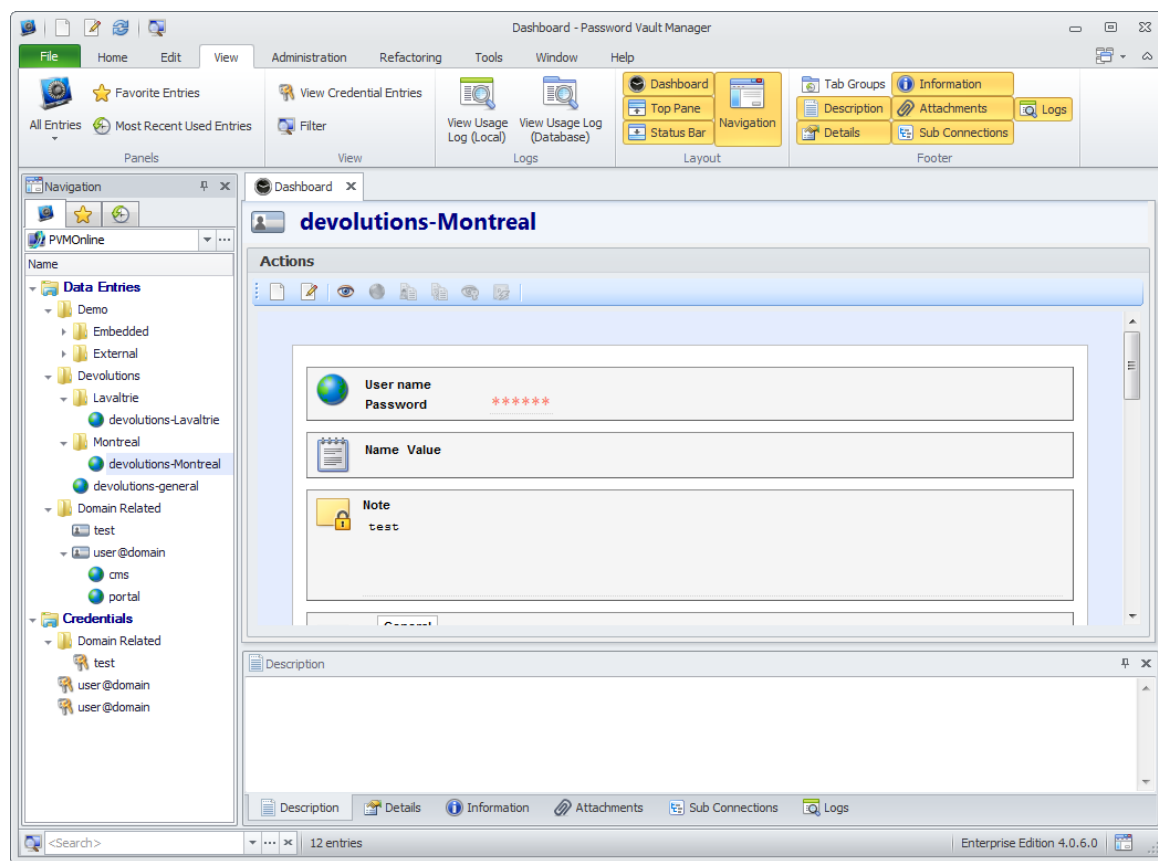


The list can contain a large number of entry configurations. Use the filter box at the bottom of the screen to help you find what you need. Learn more about this feature [here](#).

#### Tree View

The tree view offers the most flexible display mode. It's also possible to specify the visible columns in the tree list view.

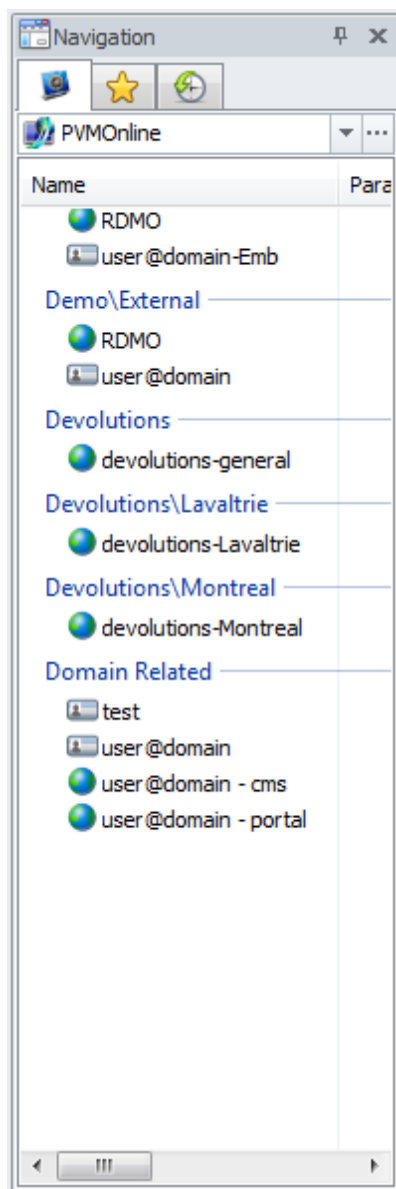
By focusing the control, you can activate the incremental search by typing letters and numbers. Use Ctrl +Up/Down to move to the next or previous matching entry and Backspace to delete the current incremental search.

**Tree view**

## List View (details)

The list view displays the sessions as icons, titles or details.



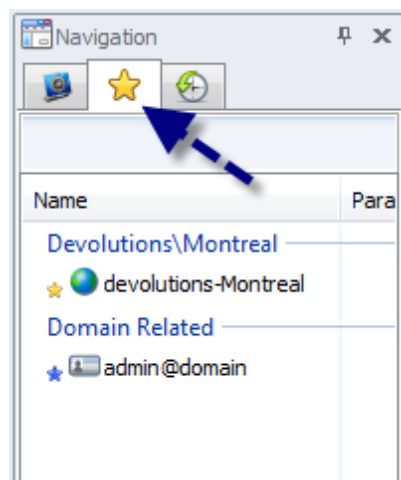


Details view

#### 5.4.1.2 Favorite Entries

##### Description

This view contains all of your favorite sessions that have been configured in the current data source.



Favorite view

There are two types of favorite sessions:

- Shared favorites ★
- Local favorites ★

Shared favorites are shared by all users who are connected to the data source, and are directly configured from the entry.

Local favorites are flagged locally on the current machine by the current user. The settings are saved in the application settings.

### Adding an entry to the Shared Favorites

You may add or remove an entry from the shared favorites by editing its properties.

The screenshot shows the 'Session settings dialog' with the 'More' tab active. The 'Description' section has 'Text' selected. The 'Keywords/tags' section is empty. The 'Other' section contains the following fields and options:

- Typing macro: [Empty text box]
- Initial wait: 0 sec
- Delay time {Delay}: 300 ms
- Macro password: [Empty text box]
- Expire: January -08-2014
- Include in shared favorites: ☒

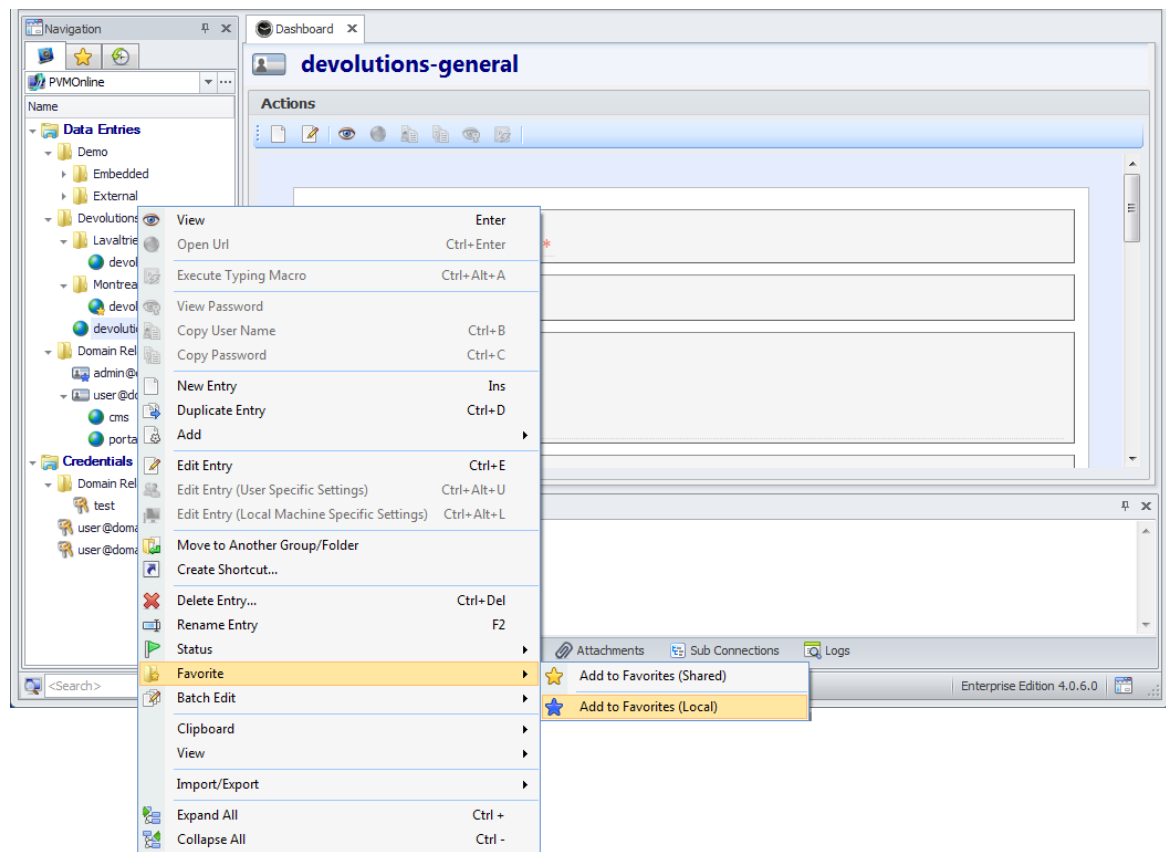
A blue dashed arrow points to the 'Macro password' field.

**Session settings dialog**

You can also use the context menu to include or remove an entry from your favorites. To do this, right click on the entry.

## Adding an entry to the Local Favorites

The local favorites or user favorites can be added through the entry context menu.

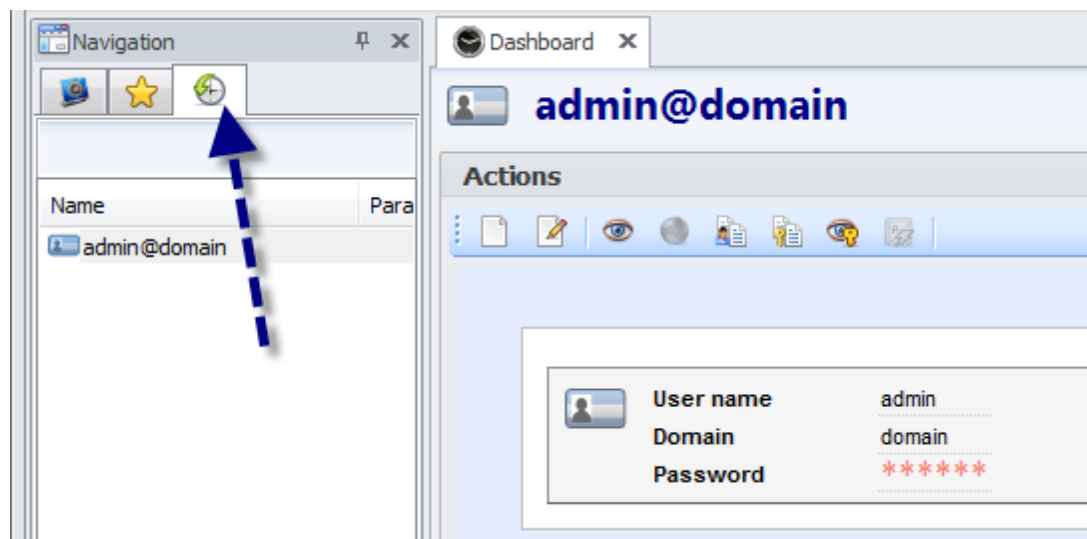


Entry context menu

### 5.4.1.3 Most Recently Used Entries

#### Description

This view show the most recently used sessions for a specific data source on the local computer.



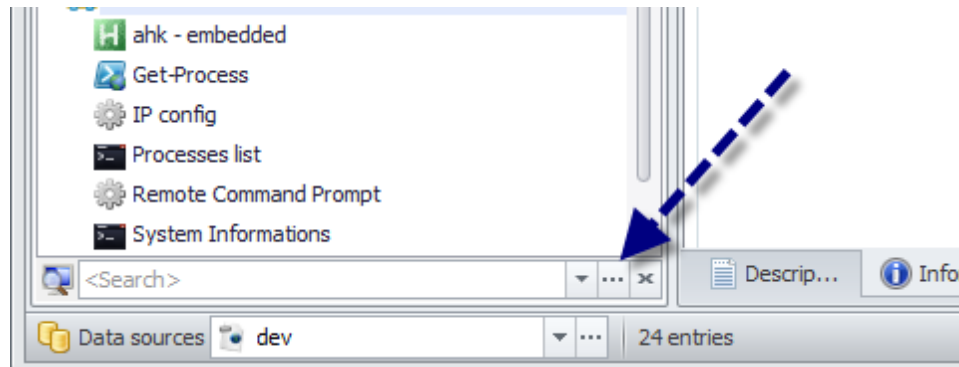
Most recently view

## 5.4.2 Search/Filter

### Description

It's also possible to apply a filter by typing some characters in the filter box. The filter is applied using the specified settings in the application's options.

The search/filter is below the entry list, select the ellipsis button to display the options.

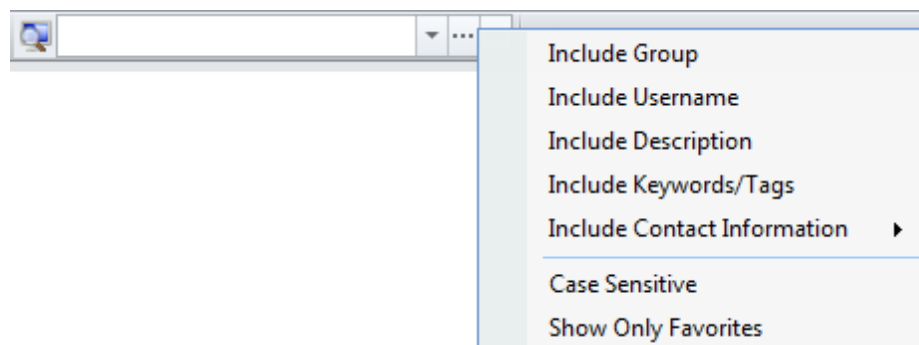


**Search/Filter area.**

The filter expression is matched against fields as selected in the filter options.

- Entry name
- Group name
- Host
- Description
- Keywords
- Sub Connections
- Various Contact information fields (choose them in the sub menu)

It's possible to further exclude results by choosing to display only favorite entries.



**Filter box and menus**

If the entry view is hidden, a dialog will appear with the filtered content.

## 5.4.3 Logs

### 5.4.3.1 Usage Logs (Local)

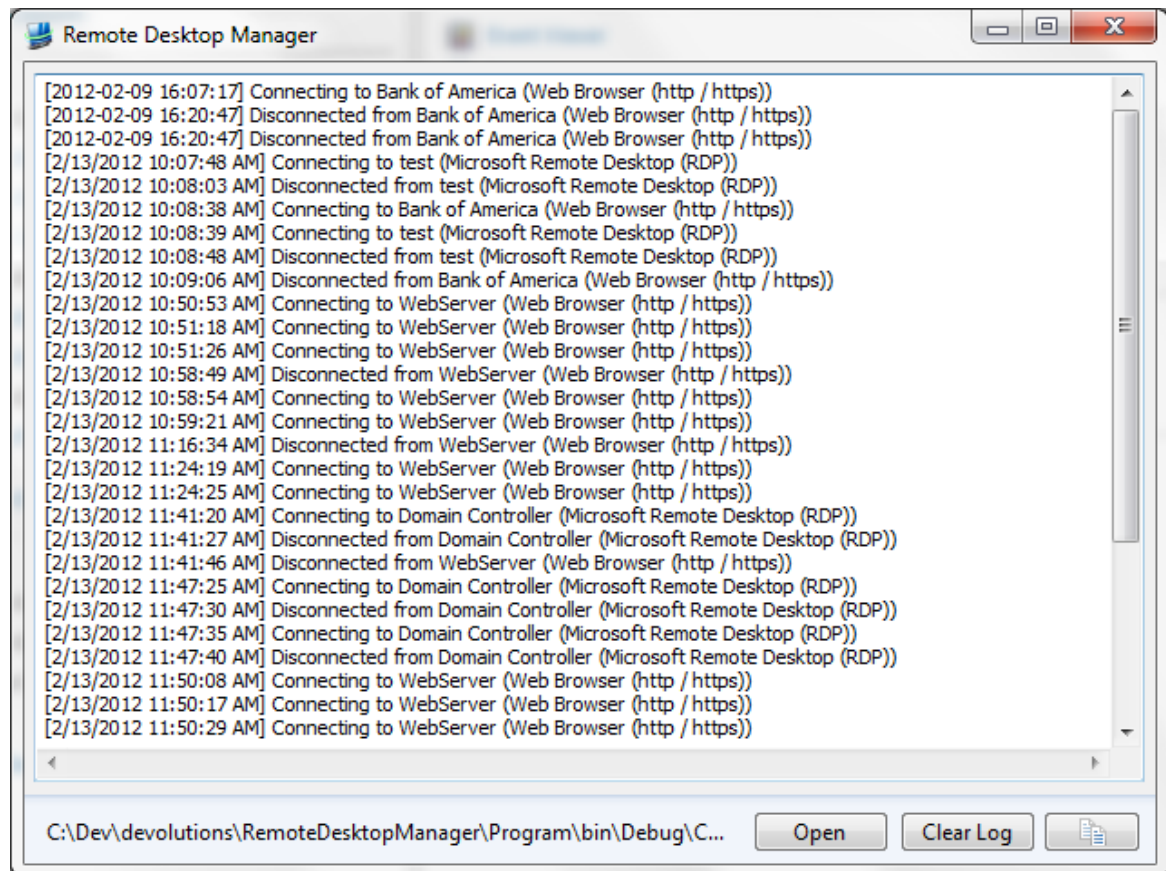
#### Description

Password Vault Manager supports two types of logs:

- Local usage log, which is file based
- [Global usage log](#), in a database

#### Local Session Log

A basic local logging system is automatically available by default. This allows the system administrator to view the log file for all session activities on the current machine. It's available on the local machine only via the menu **View Local Connection Log**.



Local connection log

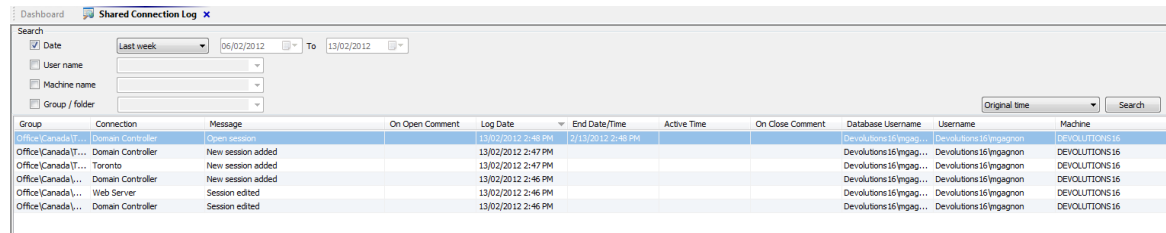
The log is written directly to a file in the settings folder.

### 5.4.3.2 Usage Logs (Global)

#### Description

The shared entry log offers a more robust solution. Through it, it's possible to monitor an opened entry for all users by using the SQL Server, or the Remote Desktop Manager Online data source. The log is available for a specific entry in the context menu **View->Logs**, in the entry configuration (Log tab page), and in the dashboard.

The log contains all the CRUD (add, edit and delete) operations, including the time and the username. It also contains all the details about the open/closed entries.



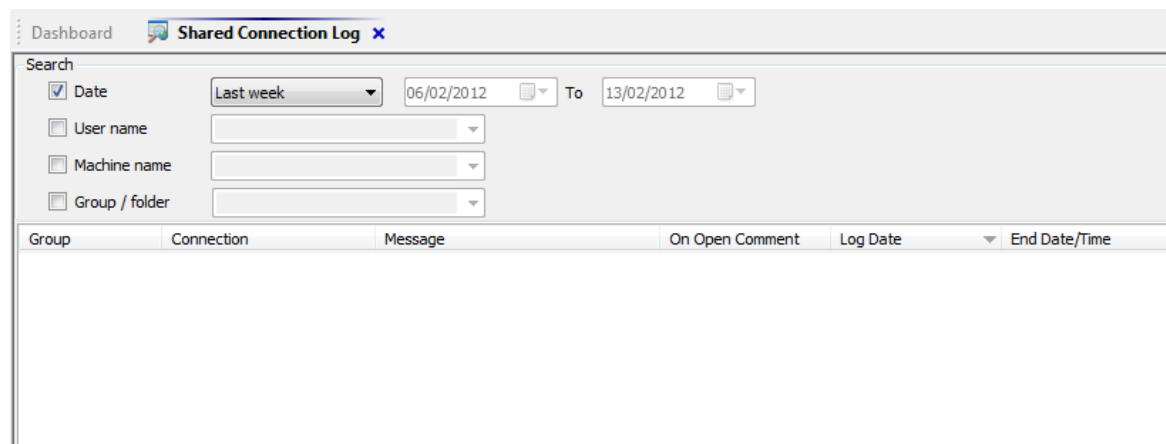
Group	Connection	Message	On Open Comment	Log Date	End Date/Time	Active Time	On Close Comment	Database Username	Username	Machine
Office/Canada/IT...	Domain Controller	Open session		13/02/2012 2:48 PM	21/13/2012 2:48 PM			Devolutions 16/ingag...	Devolutions 16/ingag...	DEVOLUTIONS 16
Office/Canada/IT...	Domain Controller	New session added		13/02/2012 2:47 PM				Devolutions 16/ingag...	Devolutions 16/ingag...	DEVOLUTIONS 16
Office/Canada/IT...	Toronto	New session added		13/02/2012 2:47 PM				Devolutions 16/ingag...	Devolutions 16/ingag...	DEVOLUTIONS 16
Office/Canada/IT...	Domain Controller	New session added		13/02/2012 2:46 PM				Devolutions 16/ingag...	Devolutions 16/ingag...	DEVOLUTIONS 16
Office/Canada/IT...	Web Server	Session edited		13/02/2012 2:46 PM				Devolutions 16/ingag...	Devolutions 16/ingag...	DEVOLUTIONS 16
Office/Canada/IT...	Domain Controller	Session edited		13/02/2012 2:46 PM				Devolutions 16/ingag...	Devolutions 16/ingag...	DEVOLUTIONS 16

entry logs

It's also possible to view in real time who is connected by ticking the checkbox "Show live entry only." This will filter the list to display only the opened entries in the grid.

The entry log can be visualized in a global view by using the shared connection log (**View Shared Connection Log**). Use this view to find information for multiple entries for a specific time, or for a specific user. The window is similar to a search tool and it offers multiple filter types, including:

- User name
- Machine name
- Time period



Group	Connection	Message	On Open Comment	Log Date	End Date/Time
-------	------------	---------	-----------------	----------	---------------

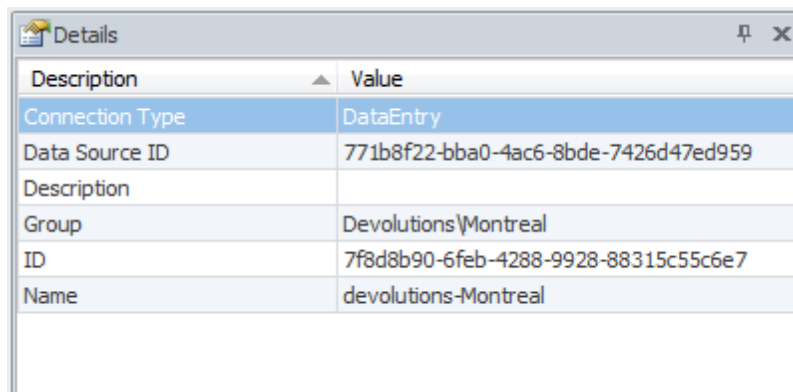
Shared connection log panel

## 5.4.4 Panes

### 5.4.4.1 Details

#### Description

The connection details can be found on the dashboard, and is a simple grid that lists complete entry information. The grid supports the copy/paste feature. Exporting is not available.



Description	Value
Connection Type	DataEntry
Data Source ID	771b8f22-bba0-4ac6-8bde-7426d47ed959
Description	
Group	Devolutions\Montreal
ID	7f8d8b90-6feb-4288-9928-88315c55c6e7
Name	devolutions-Montreal

Connection detail grid from the dashboard

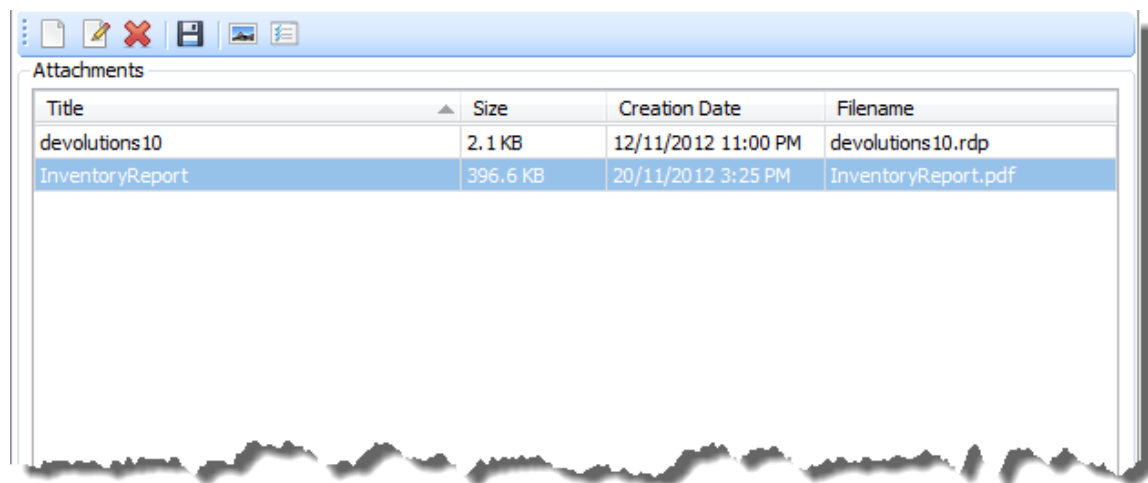
#### 5.4.4.2 Attachments

##### Description

With the Enterprise edition and an advanced data source, you can add an attachment to an entry. The file is stored directly in the database. It won't be available in offline mode.



Only available with an [Advanced Data Source](#)



Title	Size	Creation Date	Filename
devolutions10	2.1 KB	12/11/2012 11:00 PM	devolutions10.rdp
InventoryReport	396.6 KB	20/11/2012 3:25 PM	InventoryReport.pdf

Attachment list

The attachment can be any type and any size, depending on your bandwidth and database. You can also view a saved attachment from: the entry context menu, the entry properties, or directly on the dashboard.

#### 5.4.4.3 Information

##### Description

The information tab contains a wide assortment of information on the entry. Some purely informative and some of operational nature. It contains multiple tabs in order to present as much information as



possible.

## Settings

### Computer

The computer tab displays information that is mostly informative, as well as settings that indicate the entry is a dashboard that can be displayed in a separate pane.

Connection More VPN Sub Connections Information Events Attachments Logs Tools Advanced

Computer Contact Notes Other Statistics

Computer

OS  ▼ MAC  Discover

Hardware

Software

iLO  [Server remote management \(Url\)](#)

Home page

Domain

☐ Is virtual machine

☐ Is Terminal server ☐ Is VMware server

☐ Is Hyper-V server ☐ Is XenServer

Computer tab

### Contact

The contact tab displays information on a person that has a link to the entry. It could be the technician managing a remote machine.

The screenshot shows the 'Sub Connections' tab in the Password Vault Manager. Under the 'Sub Connections' tab, there is a 'Contact' sub-tab. The 'Contact' sub-tab contains a form with the following fields:

- First name
- Last name
- Company
- Customer #
- Prefix
- Title
- Email
- Phone
- Fax
- Address
- City
- State
- Zip code
- Country
- Skype

At the bottom right of the form, there are two buttons: 'Email Contact' and 'Call (Skype)'.

Contact Tab

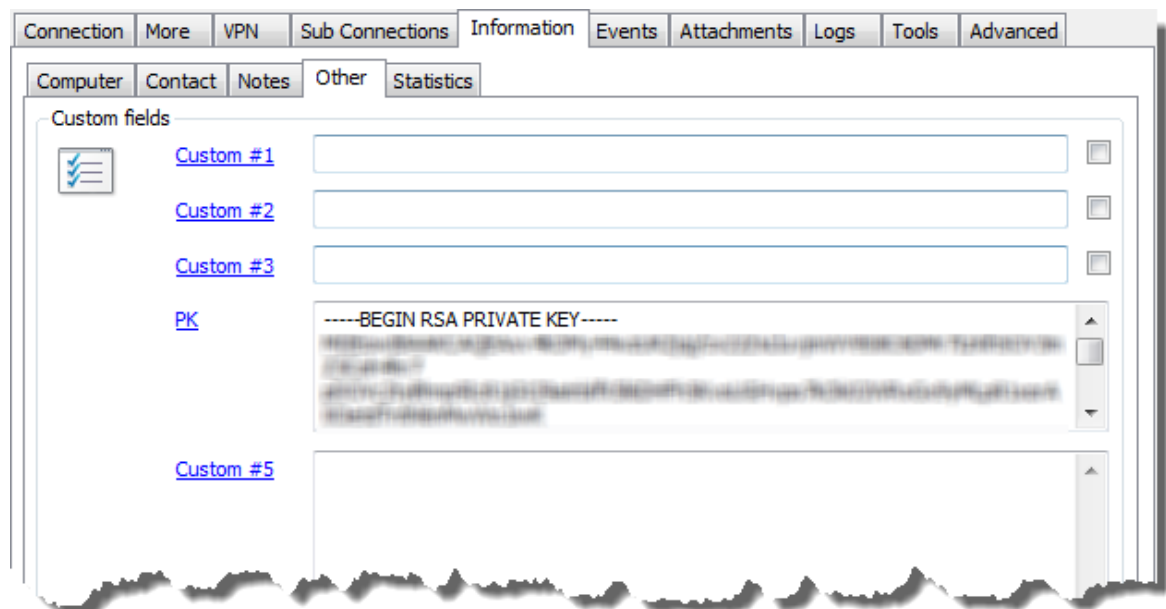
### Notes

The notes tab contains only one control. A text area where you can enter any information you require.

### Others

The others tab contains five custom fields. The reason behind having discrete fields is that they are available via [Field Variables](#) and can therefore be accessed in sub connections while being defined in the parent connection (see Sub Connections [Overview](#)).

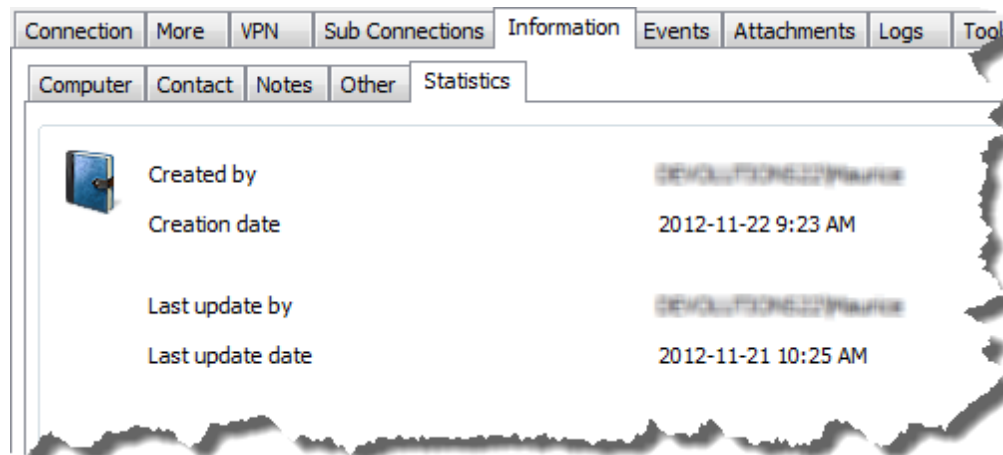
For ease of use, the labels can be modified to reflect the data you intend to store in them. Clicking on the label allows you to enter any caption you desire, as you can see in this screen capture where the custom field has been re-labeled PK as it is meant to contain a private key.



Other Tab

### Statistics

The statistics tab simply displays some information on the creation and last modification of the entry.

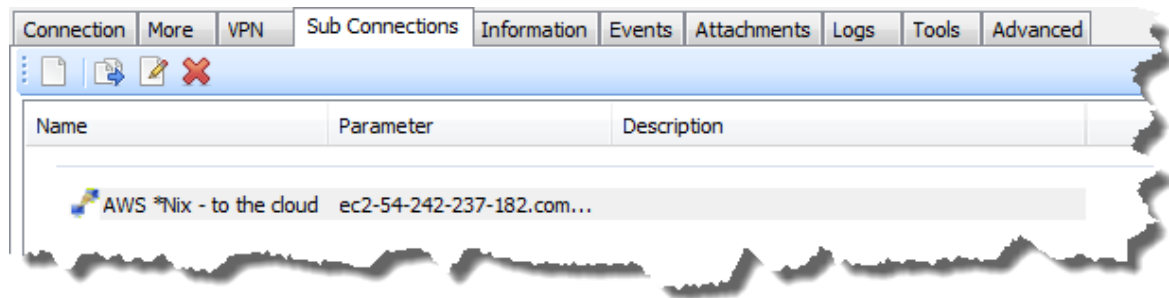


Statistics Tab

#### 5.4.4.4 Sub Connections

### Description

The Sub Connections tab is only visible when you have defined sub connections for the current entry.



Sub Connections Tab

Please refer to the Sub Connections [Overview](#) topic for more information.

#### 5.4.4.5 Logs

##### Description

This pane displays the [Usage Logs \(Global\)](#) saved in the database.



Only available with an [Advanced Data Source](#)

#### 5.4.4.6 Status Bar

##### Description

The status bar allows you to:

- Filter the entry list.
- View the entry count in the selected data source
- [Register](#) or change the serial number by double clicking on the application version label
- Toggle the Navigation pane visibility

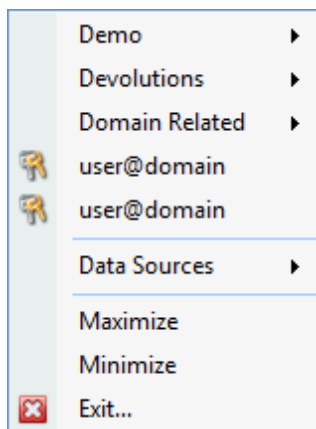


Status bar

#### 5.4.5 Tray Icon

##### Description

Password Vault Manager also lets you show the entry list and other useful information in the Windows system tray. You can also customize the content. To open an entry, click on it or use the context menu by right-clicking on the icon to access more options.



Trayicon view

The application's options window contains many settings that enable you to customize the system tray icon settings. You can also disable it from here, or change its default behavior.

## System Tray Icon Sections

Section name	
Entry List	Shows the entries from the current data source. Entries are all listed by default, it's also possible to include only those who are marked as favorites.
Data Sources	Lists the available data source and allows the user to switch dynamically from one to another. This section only appears if it's enabled and more than one data source is configured.
Application control	You can interact with the main window application and also Exit from the application.

### 5.4.6 Keyboard

#### 5.4.6.1 Shortcuts

#### Open Data Entry

**Enter:** Open data entry

**Ctrl+Enter:** Open url

#### Edit Mode

**F11:** Save & close

#### Edit Data Entry

**Ctrl+N:** Add a new data entry

**Ctrl+D:** Create a copy of the current data entry

**Ctrl+Del:** Delete the selected data entries

**F2:** Rename the data entry or the group

## View

**F3:** Show the data entry list (tile view)

**F4:** Show the data entry list (list view)

**F5:** Refresh the current list

**F6:** Show the entry list (large icon)

**F7:** Show the entry list (tree view)

**F8:** Show the opened data entry view

**F9:** Show the most recently used view

**F10:** Show the favorite entry view

**F11:** Show the local usage log

**F12:** Show the entry list (detail view)

**Ctrl+F4:** Close the current tab page

**Alt+F6:** Hide / show the header panel

**Alt+F7:** Hide / show the footer panel

**Alt+F8:** Hide / show the entry panel

**Alt+F9:** Hide / show the tabbed panel

## Miscellaneous

**F1:** View online help (<http://help.passwordvaultmanager.com/>)

## 5.5 Administration

### Description

The Administration tab is only visible for [Advanced Data Sources](#).

Refer to the child topics for more information.

[Data Source Settings](#)

[Security Providers](#)

[User Management](#)

[Security Group Management](#)

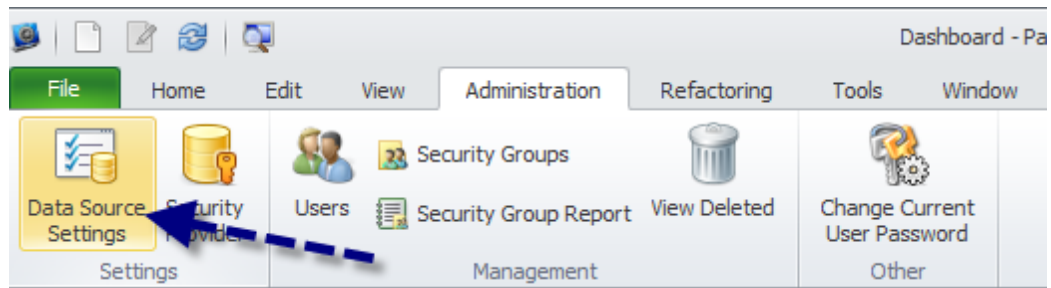
[Security Group Report](#)

[Deleted Entries](#)

## 5.5.1 Data Source Settings

### Description

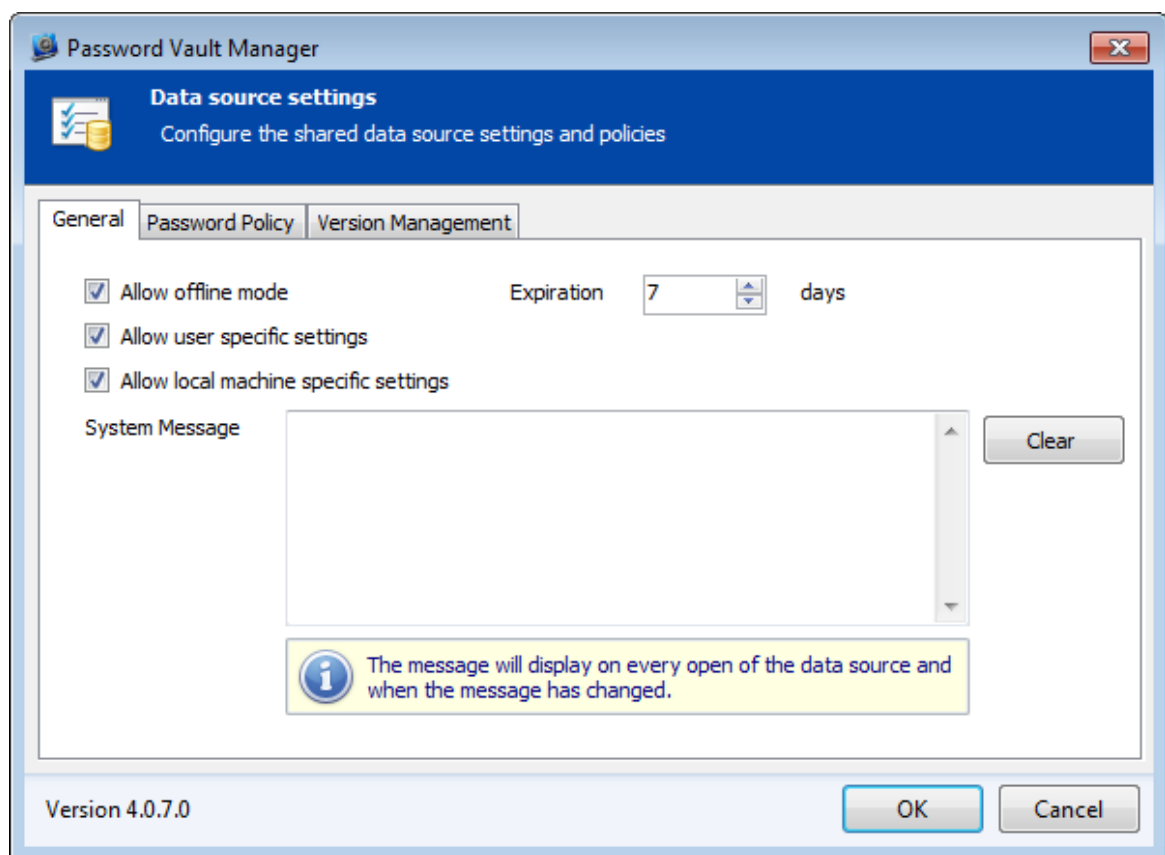
Accessible from the menu **Administration -> Data Source Settings**



Data Source Settings menu

Data source settings allows you to control many aspects of the data source. Settings like offline mode, password policies & version management.

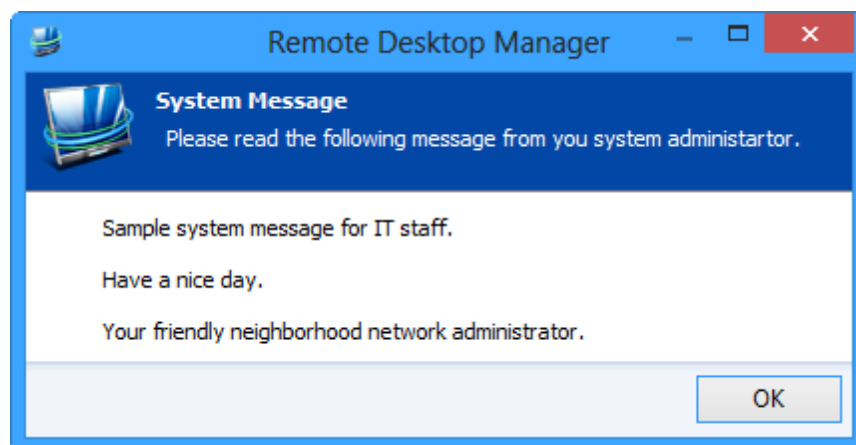
### General Tab



Data source settings - General tab

#### General

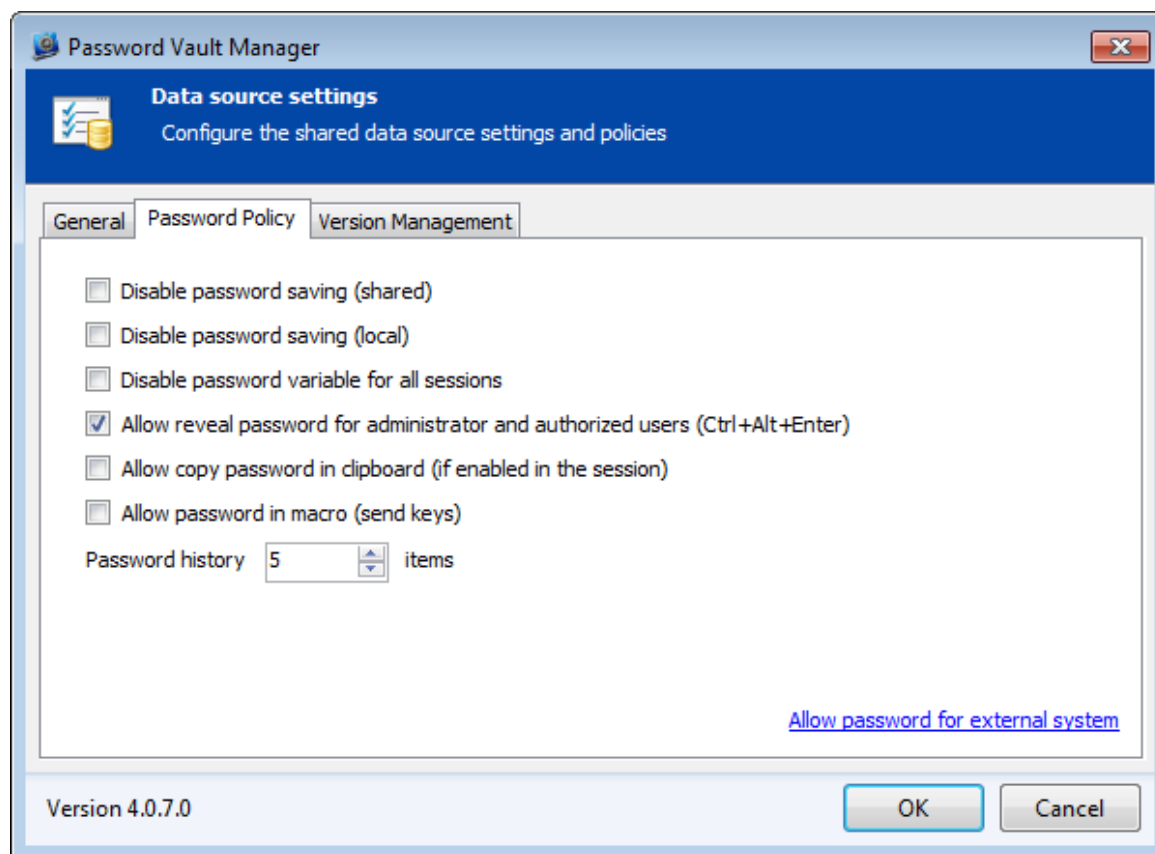
Allow offline mode	Does this data source support offline mode. Useful when using a VPN connection that makes using local network impossible. Offline mode does not permit modification of sessions.
Expiration	Number of days that the local copy will be considered valid. You should go online prior to the end of that period.
Allow user specific settings	Enables the use of user specific settings. See <a href="#">User Specific Settings</a> for more information.
Allow local machine specific settings	Enables the use of local machine specific settings. See <a href="#">Local Machine Specific Settings</a> for more information.
System message	The message will be displayed on every open of the data source or when the message changes. Use Ctrl+ENTER to create a new line.



Sample system message.

## Password Policy

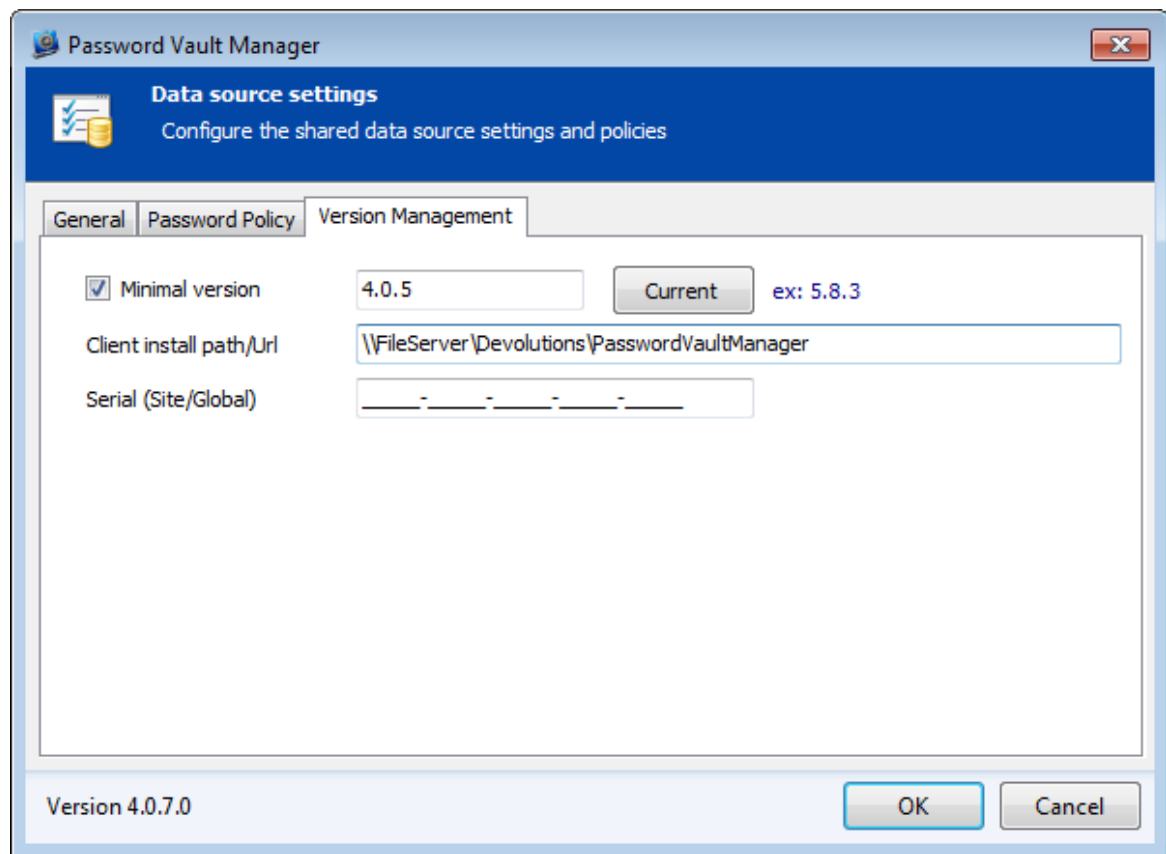




Data source settings - Password Policy tab

Password Policy	
Disable password saving (shared)	Users will not be able to save passwords within a sessions.
Disable password saving (local)	Users will not be able to save passwords using Windows credential vault.
Disable password variable for all sessions	Renders <b>\$PASSWORD\$</b> variable useless for this data source.
Allow reveal password for administrator and authorized users (Ctrl+Alt+Enter)	Controls if reveal password is enabled for authorized users.
Allow copy password in clipboard (if enabled in the session)	Enables copy password if enabled for the given session.
Allow password in macro (send keys)	Renders <b>\$MACRO_PASSWORD\$</b> variable useless for this data source.
Password history X items	Saved password history count. See <a href="#">Password History</a> for more information.

## Version Management



Data source settings - Password Policy tab

Version Management	
Minimal version	Force users of the data source to use a minimal version. Enter the entire version number (7.9.10.0) to force a specific version or use partial number for force a subset version (7.9).
Client install path/url	Used in conjunction with then minimal version, once a minimal version requirement is not met the system will prompt the user that the version is to low and open the link (path/url) for the user to install the new version.
Serial (Site/Global)	Easily distribute Site/Global serials to the entire organization. Once the data source is opened the system checks to see if a serial exists, if not it will automatically use the given serial. In the case where the serial already exists it checks to see which is newer and if the defined serial is newer it gets updated.

## 5.5.2 Security Providers

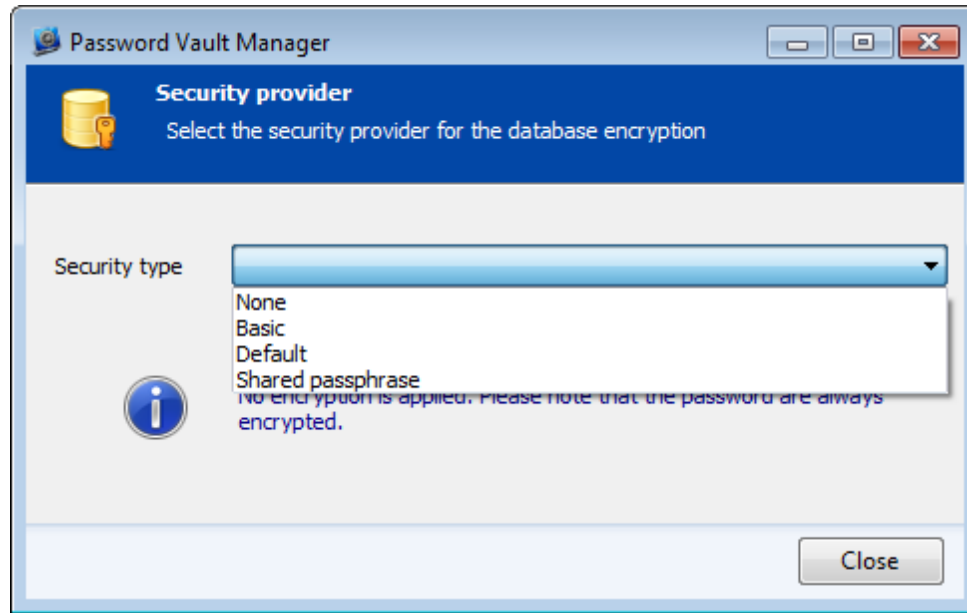
### Description

The security provider is responsible for encrypting the data in the database. It's available with [Advanced Data Sources](#).



Regardless of the security provider you select, the password is encrypted at least once in the database. There is no password stored in clear text at any time.

Select the provider you wish, and configure it by using the menu bar **Administration -> Security Provider**



Security provider dialog

Please note that changing a security provider when many sessions have previously been configured may take a bit of time.



If you are applying a new provider to an existing data source, we advise you to perform a backup prior to making the change.

Security Provider	
None	The session data is not encrypted at all.
Basic	All of the data is encrypted in the database, and it's impossible for an external system to access it.
Default	This is the legacy security provider. The data is encrypted if the session configuration is set accordingly in the advanced settings.
Shared passphrase	All of the data is encrypted with a mix of our key, a salt and the pass phrase. This is the most secure encryption, but if the passphrase is lost, there is nothing that can be done to recover the data.



By using your own pass phrase with Remote Desktop Manager Online, you ensure that nobody can read your session, even if people have direct access to your database(s).

### 5.5.3 User Management

#### Description



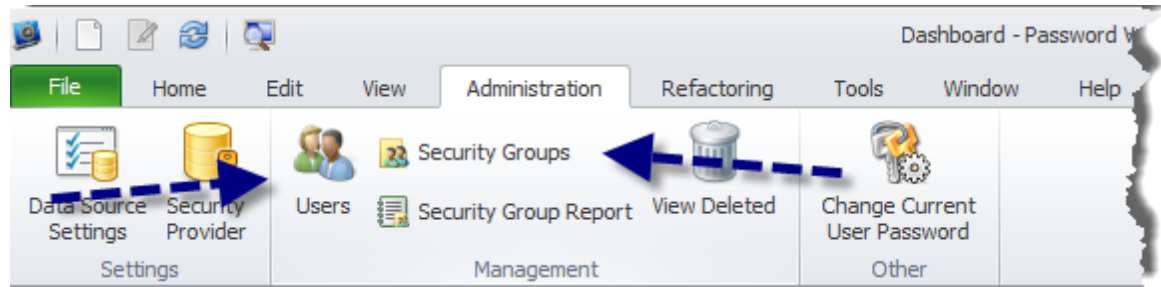
This feature requires an [advanced data sources](#).

User management allows for creating & managing users & security access rights. The user/group administration is available from the menu bar **Administration -> Users or Security Group**.



You must be administrator of the underlying database such as [MSSQL](#) & [MySQL](#) not just Password Vault Manager to create users and assign rights.

By default, SQL Server SYSDBA users and the root user of MySQL are administrators.



Administration tab - Users & Security Groups

Security Groups are used to classify entries and restrict access to certain users. There is no direct relationship between Active Directory and Security Groups. By default, every entry is created without security groups, and is visible to all connected users.



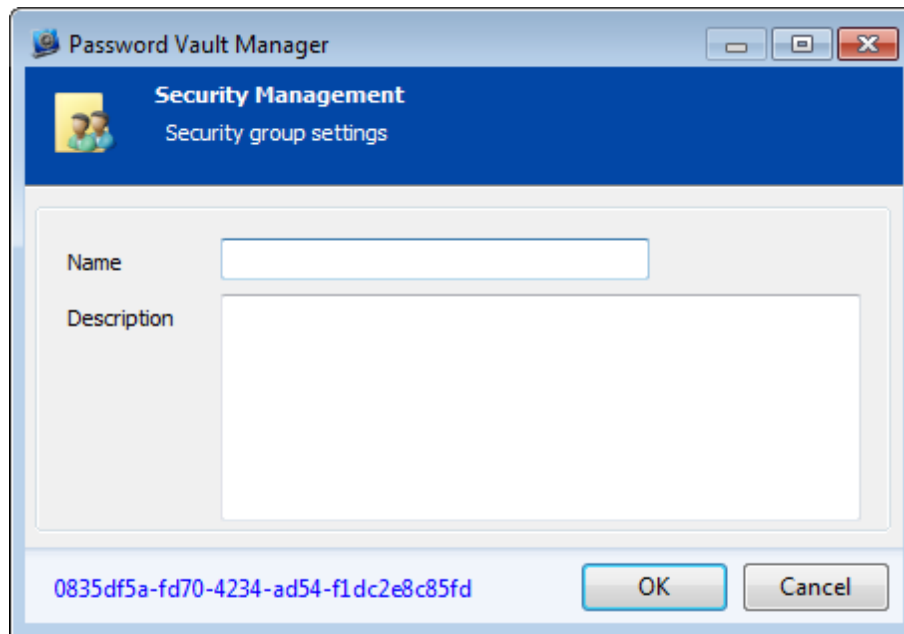
All entries without security groups are considered public.

#### Steps

1. [Create a security group](#)
2. [Create a users](#)
3. [Link the security group to a user](#)
4. [Assign the security group to the session](#)

#### Create a security group

Security groups are created from the Security Groups tab using the **Add Security Group** command.



Security group dialog

### Create a users

Create the user using default security (specify the password) or integrated security (linked domain user).



Not all advanced data sources support the use of integrated security.



[MySQL](#) supports integrated security via [Windows authentication plugin](#) which is a commercial extension of MySQL.

You can assign different security options to the user, such as the allow offline mode, a read-only mode, and more. However, there is currently no way to inherit security rights from a group. They must be assigned individually for each user.

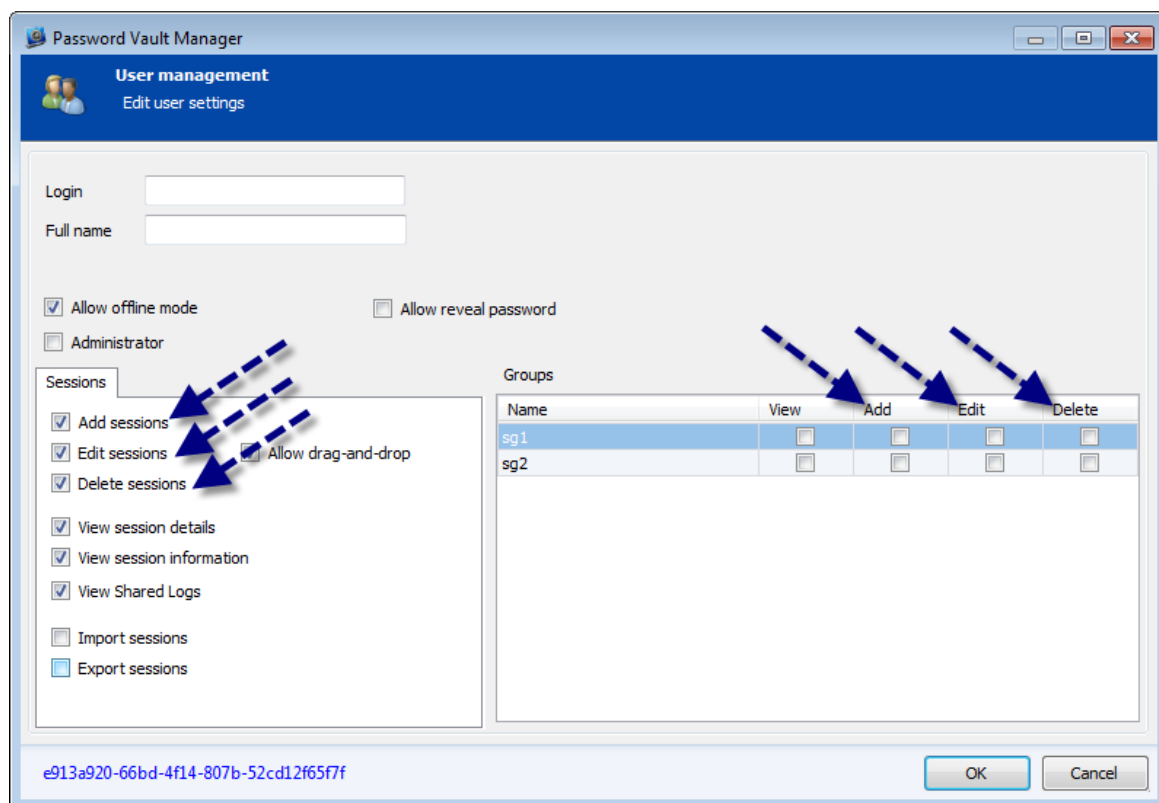
The screenshot shows the 'User management' dialog box in Password Vault Manager. The dialog has a blue header with the title 'User management' and a subtitle 'Edit user settings'. Below the header, there are two text input fields: 'Login' and 'Full name'. Underneath these fields are four checkboxes: 'Allow offline mode' (checked), 'Allow reveal password' (unchecked), 'Administrator' (unchecked), and 'Allow drag-and-drop' (checked). To the left of the 'Groups' table is a 'Sessions' section with a list of permissions: 'Add sessions', 'Edit sessions', 'Delete sessions', 'View session details', 'View session information', 'View Shared Logs', 'Import sessions', and 'Export sessions'. The 'Groups' table has two columns: 'Name' and 'View'. It contains two rows: 'sg1' and 'sg2'. The 'View' column for 'sg1' has a checked checkbox, and for 'sg2' it has an unchecked checkbox. At the bottom left of the dialog is a blue bar containing the UUID '141dd9a6-da45-4a03-80bf-a28b1ee2cdfb'. At the bottom right are 'OK' and 'Cancel' buttons.

141dd9a6-da45-4a03-80bf-a28b1ee2cdfb

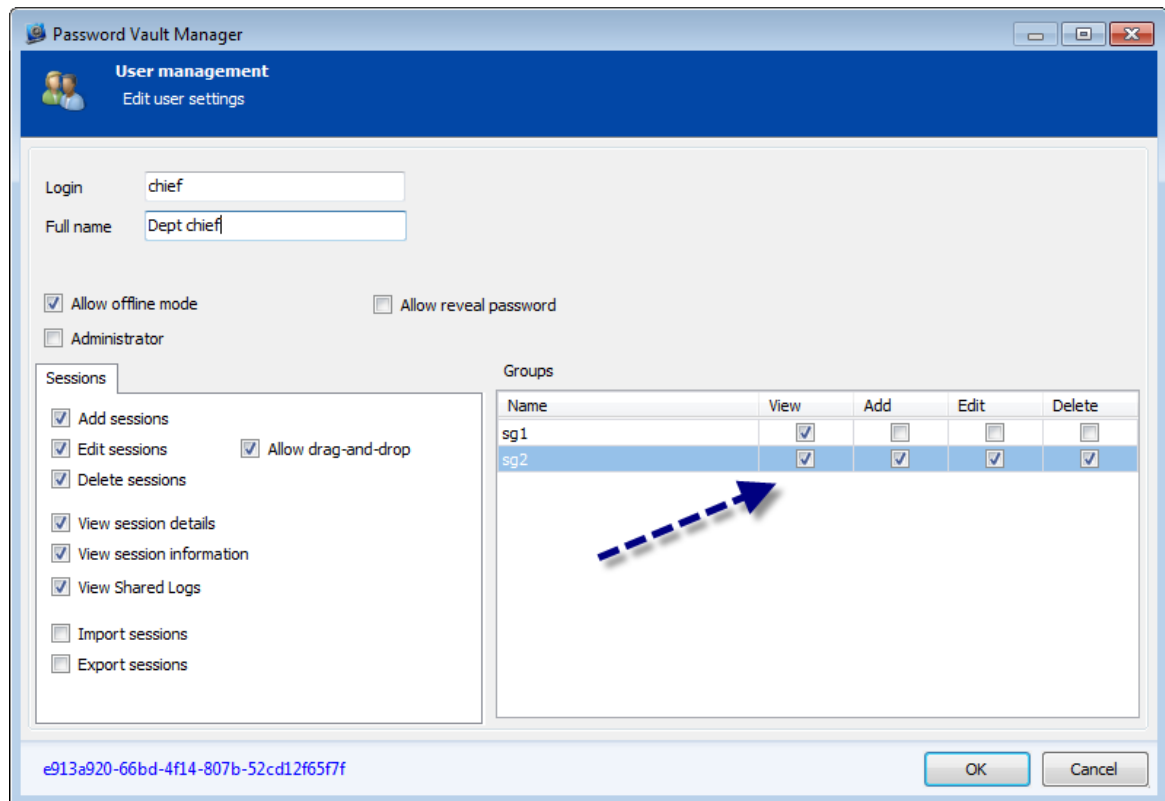
**Add/Edit user dialog**

### ***Link the security group to a user***

You must enable the corresponding permission for the column for the desired permission to appear in the grid



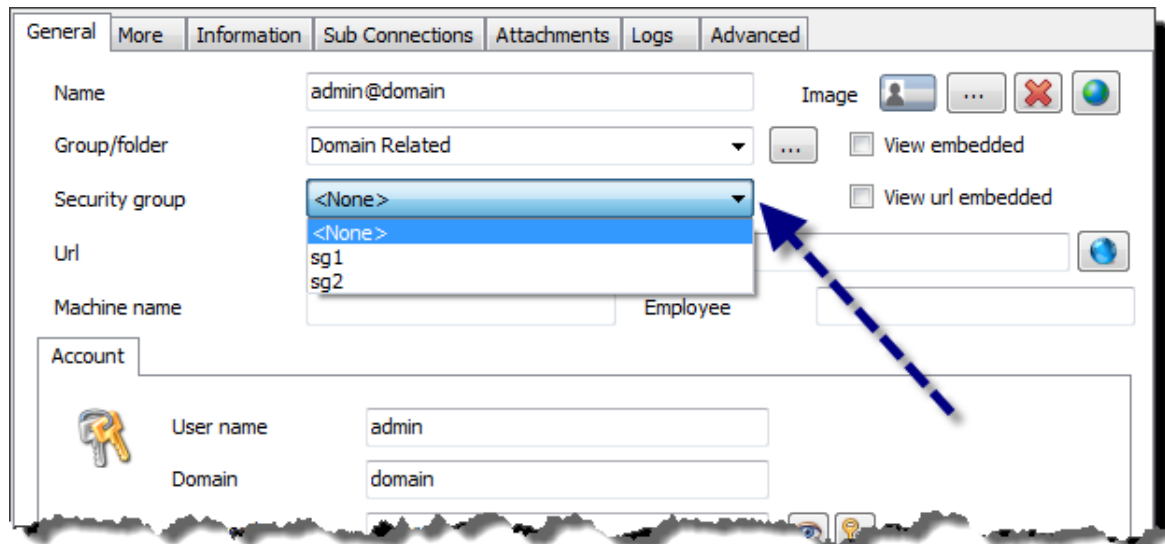
In the user editor, you can check or uncheck group security rights. A user with administrator rights has access to all of the configured sessions from all groups.



User dialog - groups

### *Assign the security group to an entry*

Security groups can be assigned to entries using the entry's property window. Each entry can only have one security group assigned.



Entry configuration - security group



## 5.5.4 Security Group Management

### Description



This feature requires an advanced data source such as [MSSQL](#) & [MySQL](#). See [Advanced Data Sources](#) for more information.

Security groups are used to secure entries from subset of system users. Assign entries to security groups then control who has access and how much control on each group.

For more information on how to create security groups see [here](#).

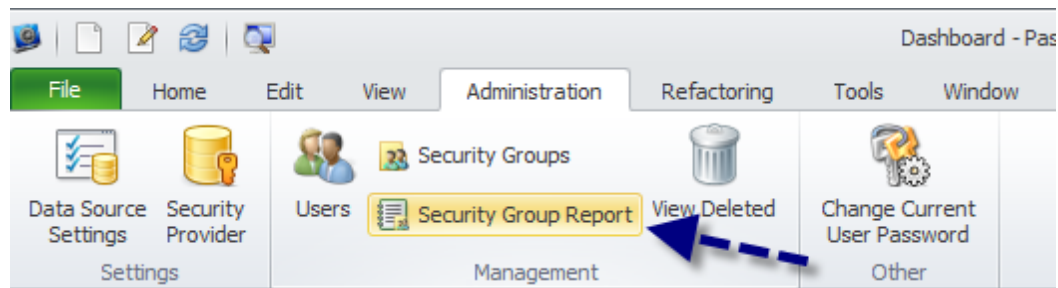
## 5.5.5 Security Group Report

### Description



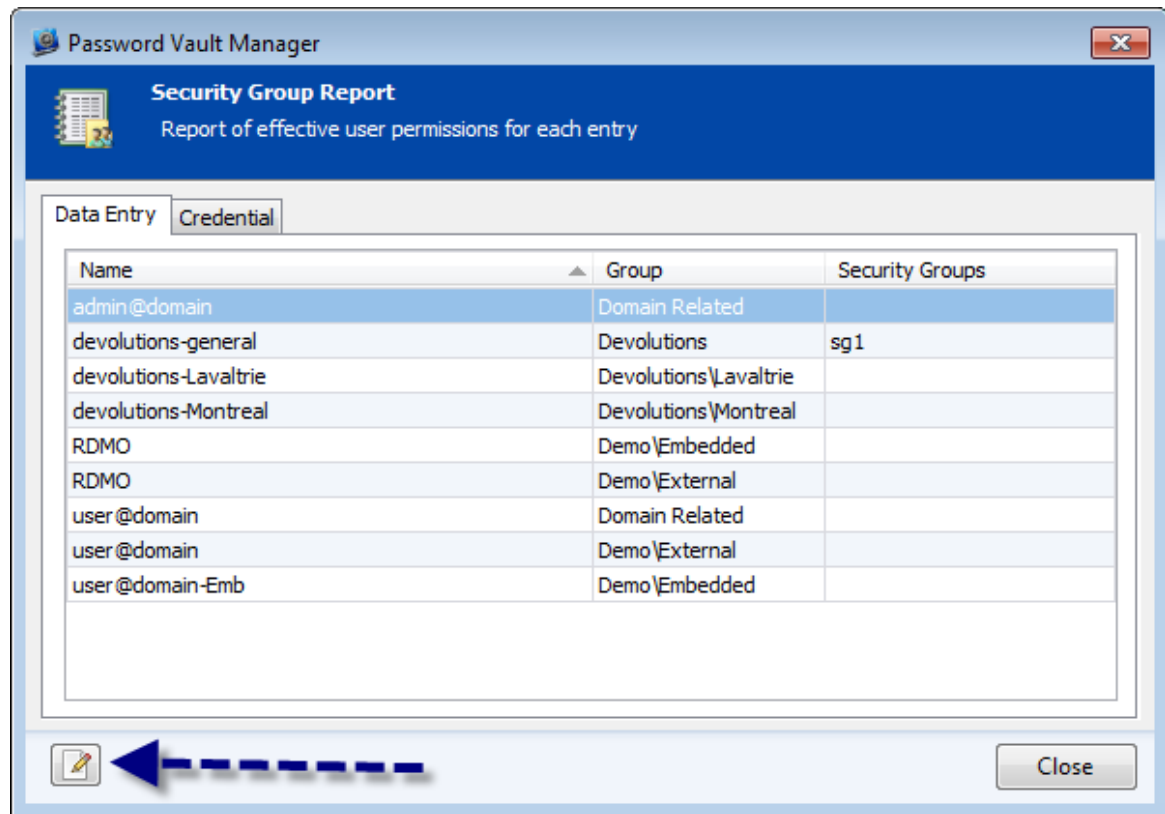
This feature requires an advanced data source such as [MSSQL](#) & [MySQL](#). See [Advanced Data Sources](#) for more information.

Security group report displays effective user permissions for all data entries in one tab, and credentials in another tab.



**Security Group Report menu**

You can use the edit button (bottom left) to quickly edit the selected session.



Security group report

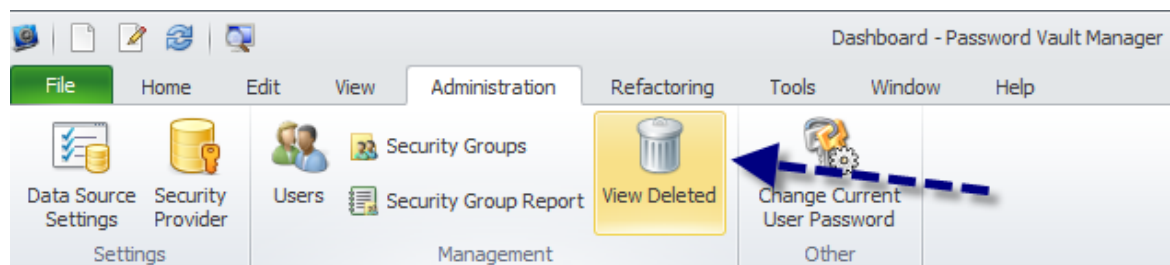
## 5.5.6 Deleted Entries

### Description



This feature requires an advanced data source such as [MSSQL](#) & [MySQL](#). See [Advanced Data Sources](#) for more information.

View deleted entry information, resurrect or permanently delete selected entries. When you perform a resurrect, the entry will be exactly as it was prior to the deletion.



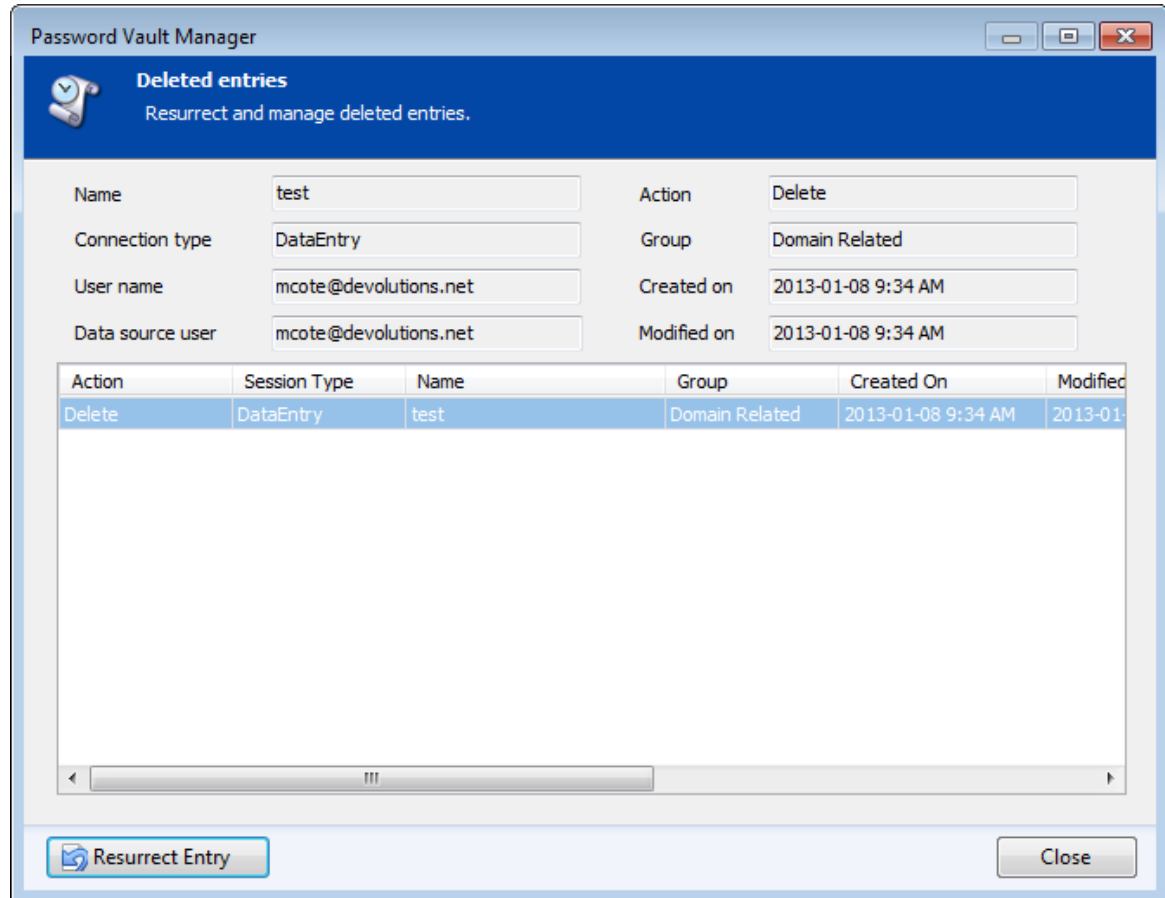
View Deleted



Deleted entries can be resurrected as long as the [Security Provider](#) has not been changed since the delete action.



Administrators can permanently delete some/all deleted entries.



View delete entries

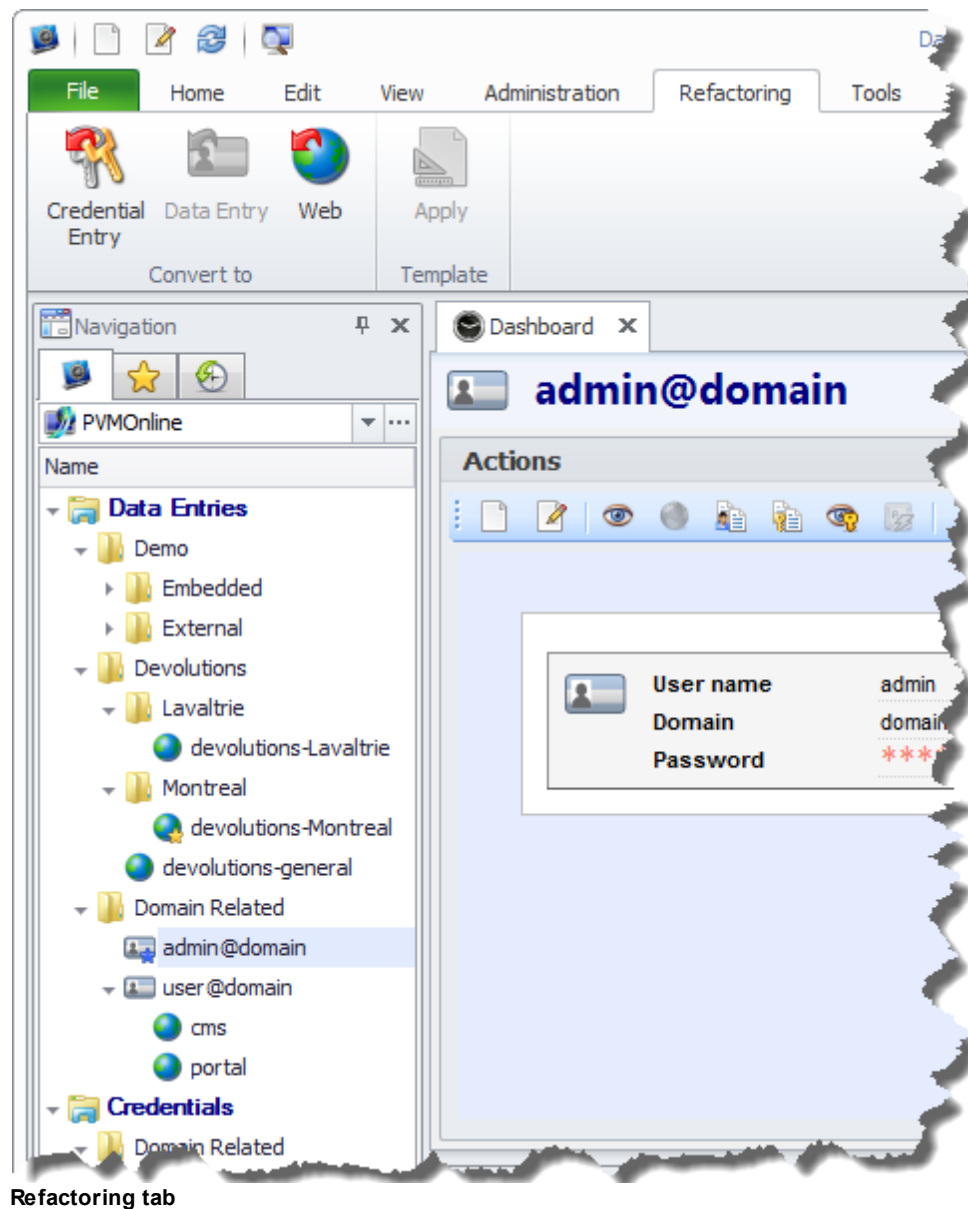
## 5.6 Refactoring

### 5.6.1 Convert To

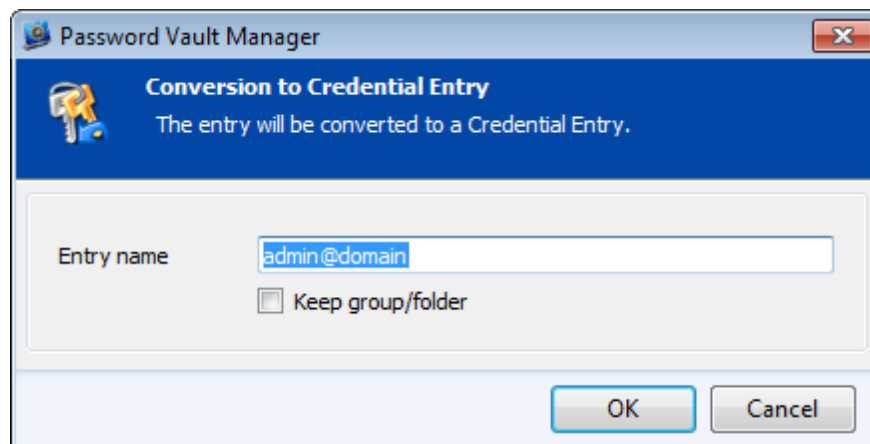
#### Description

Conversion actions are available in the refactoring tab page. They convert the current entry into another entry type. There are currently 3 kinds and their actions are enabled only when the source entry is compatible with the destination.

- Credential Entry : Converts the source entry to a credential entry.
- Data Entry : Converts the source entry to a data entry
- Web : Converts the source entry to a web entry.



When you select the refactoring you are presented with a dialog to enter a name for the new entry. You can also specify to keep the same folder. The dialogs are mostly the same for all three refactorings.



Conversion form

## 5.7 Tools

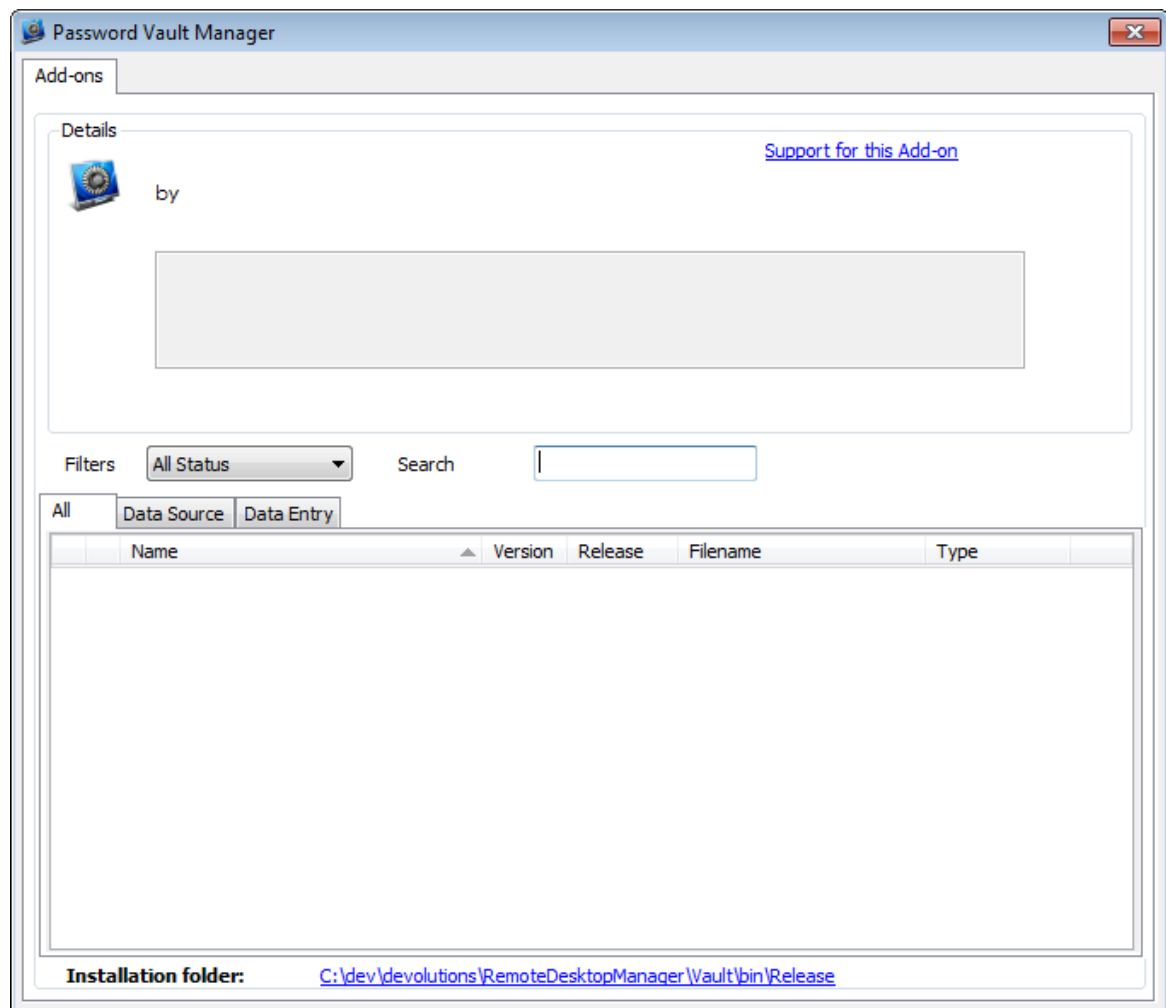
### 5.7.1 Add-on Manager

#### Description

The Add-on Manager is available in the **Tools->Add-on Manager** menu. It is used to simplify the management and the installation of different add-ons. It lists all of the add-ons that are supported by the current version of the application.

The add-ons are classified by category and can be sorted according to their current status (*available*, *outdated*, *uninstalled*). Add-ons that can be updated will be displayed with a special and clearly visible icon as seen below.

If the add-on does not require any special third party library, the manager will deploy it automatically after clicking the install button. A restart of the application will be required. The same procedure and limitation applies when uninstalling an add-on.



Add-on manager dialog

## Icon Legend

The first column of the grid contains an icon indicating the state of the add-on.

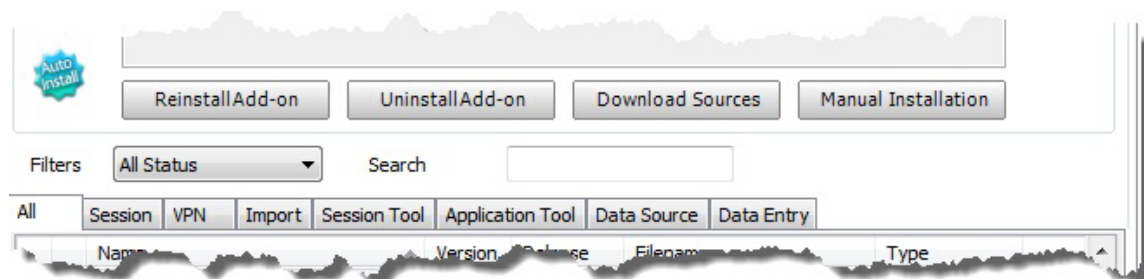
Blank : Add-on not installed locally.

✓ : Add-on installed and up to date.

! : Add-on installed but not at the latest version.

## Workflow

The visibility of the action buttons available on the form is toggled depending on the context. There are four buttons as follows.



Button highlight

### ***Reinstall Add-On***

Reinstalls the add-on after getting a confirmation from the user. An application restart will be required.

### ***Uninstall Add-On***

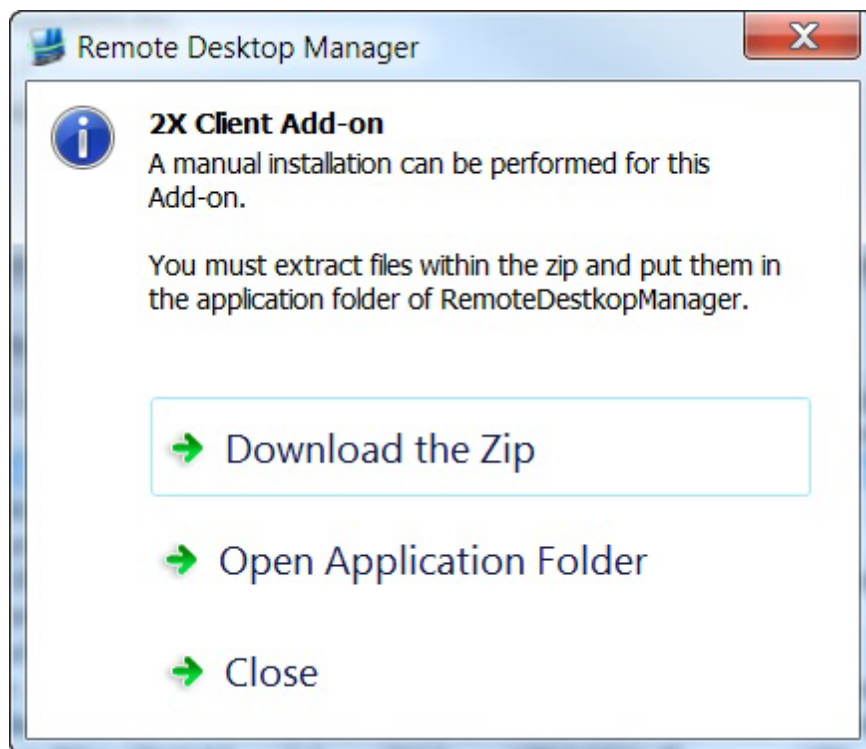
Uninstalls the add-on after getting a confirmation from the user. An application restart will be required.

### ***Download Sources***

Launches the download of an archive containing the source code for the add-on.

### ***Manual Installation***

1. Click on the Manual Installation button, the following dialog will appear



Manual Installation Dialog

2. Click on the **Open Application Folder** button, a Windows explorer will open in the proper folder

for your installation.

3. Click on **Download the Zip** button, this will launch the download of the zip archive.
4. Unzip all files in the installation folder opened at step 2.
5. Restart Password Vault Manager
6. Create a new session with the newly installed add-on type, or use it if it's a custom tool or an import dialog

## Troubleshooting

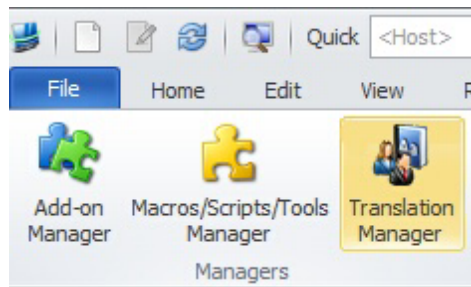
If you cannot see the add-on in the session type list, verify that it is loaded in the About box, which is available from **Help > About** menu. Also verify that the .dll file is in the Password Vault Manager folder.

Some add-ons are supported directly by Devolutions, and some others are developed by third parties. More information can be found in the [Add-On forum](#).

### 5.7.2 Translation Manager

#### Description

The translation manager is in fact a cloud based translation repository, managed by an external application named the *Devolutions Localizer*, developed by our team at Devolutions. It allows for easy translation of resources used by our products.



Ribbon button

It is launched from **Tools -> Translation Manager**.

It requires an account that you can create at [here](#). Enter the requested information and submit the form. You will receive a confirmation email within 24 hours.

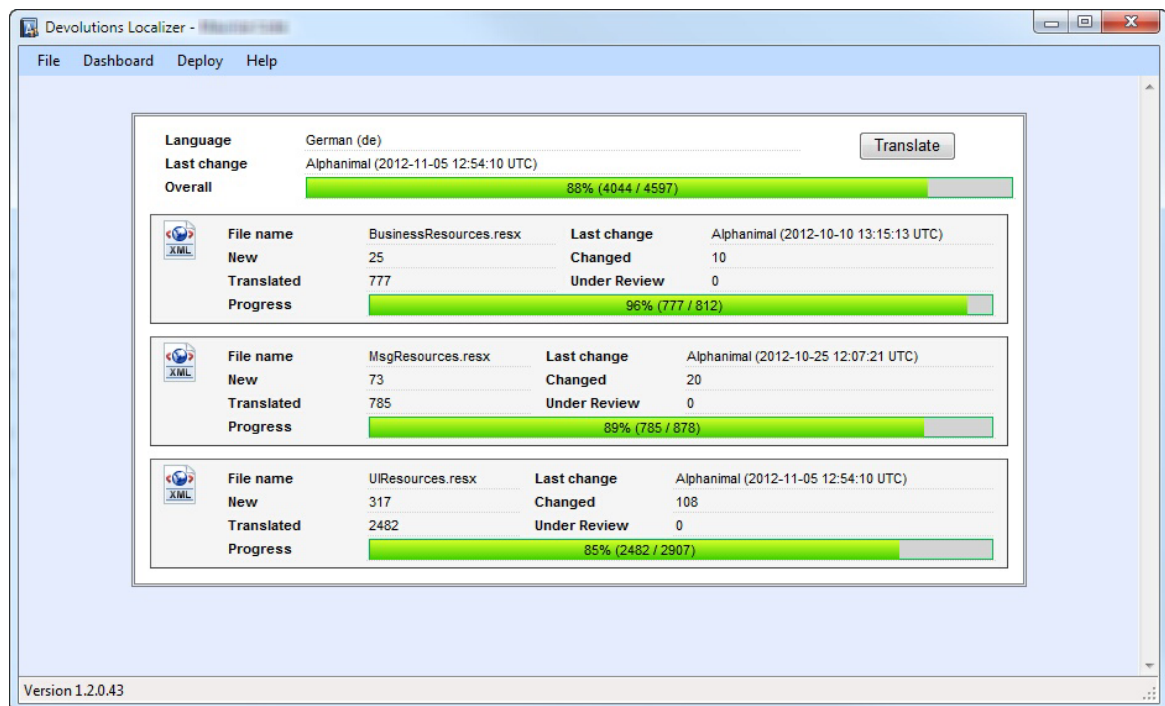
For more information on the localization process, read the [Localizer](#) topic

#### 5.7.2.1 Localizer

#### Description

The Devolutions Localizer is a ClickOnce application what will be installed in your application data folders and will check for updates automatically. It is used to manipulate the cloud based translation repository.

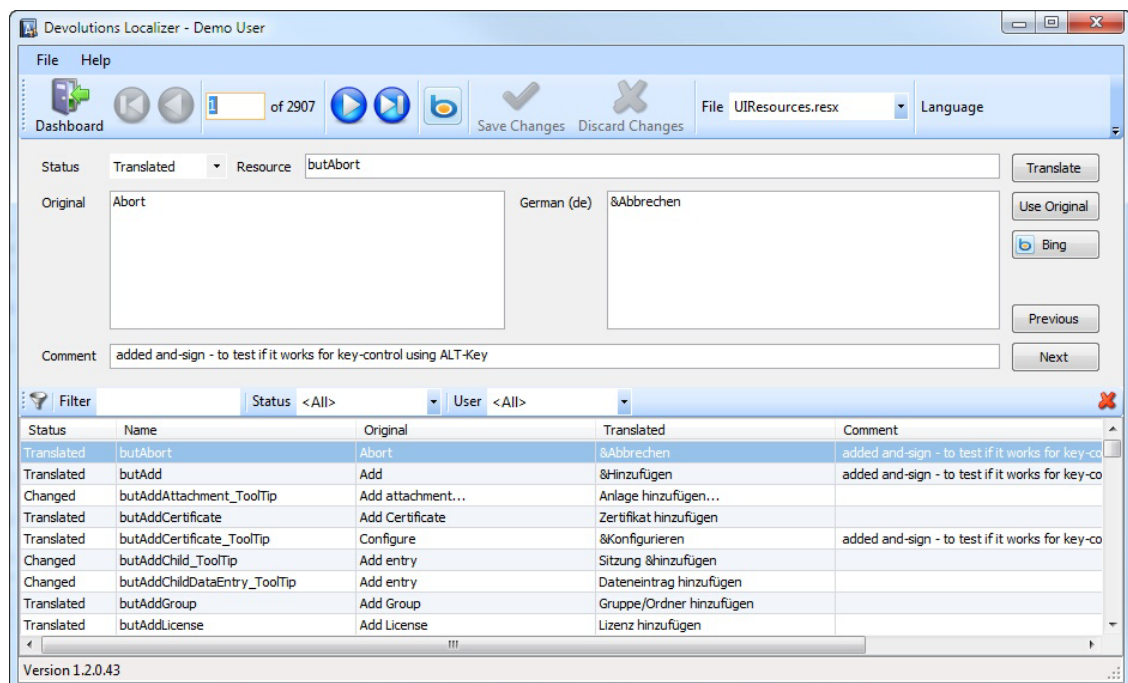




Devolutions Localizer

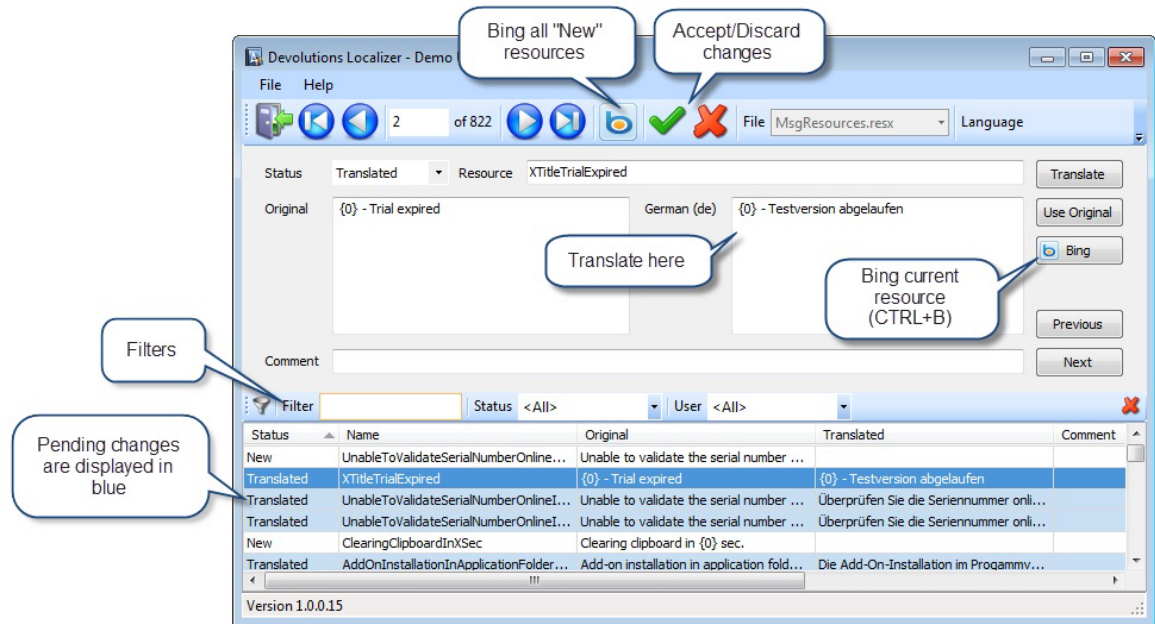
## Workflow

From the dashboard view you get a quick progress overview for each Resource file used by the application, simply choose the file you plan to work on and click the “Translate” button. You'll be presented with the following screen.



Localizer translation form

Here is a visual overview of the main features.

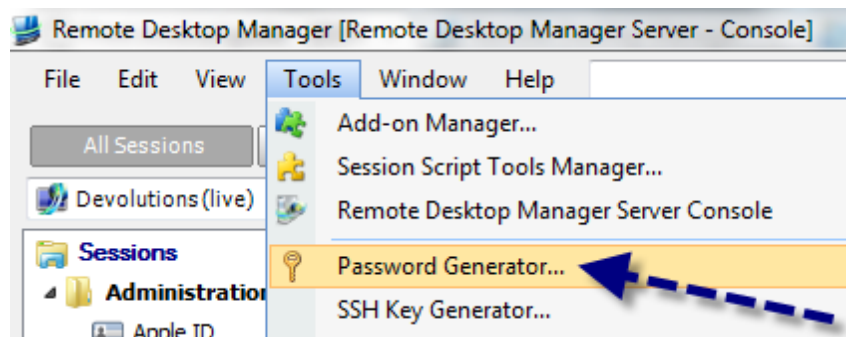


### 5.7.3 Password Generator

#### Description

The Password Generator enables you to create random passwords that are secure and difficult to interpret or predict, due to a mix of uppercase and lowercase letters, numbers and punctuation symbols.

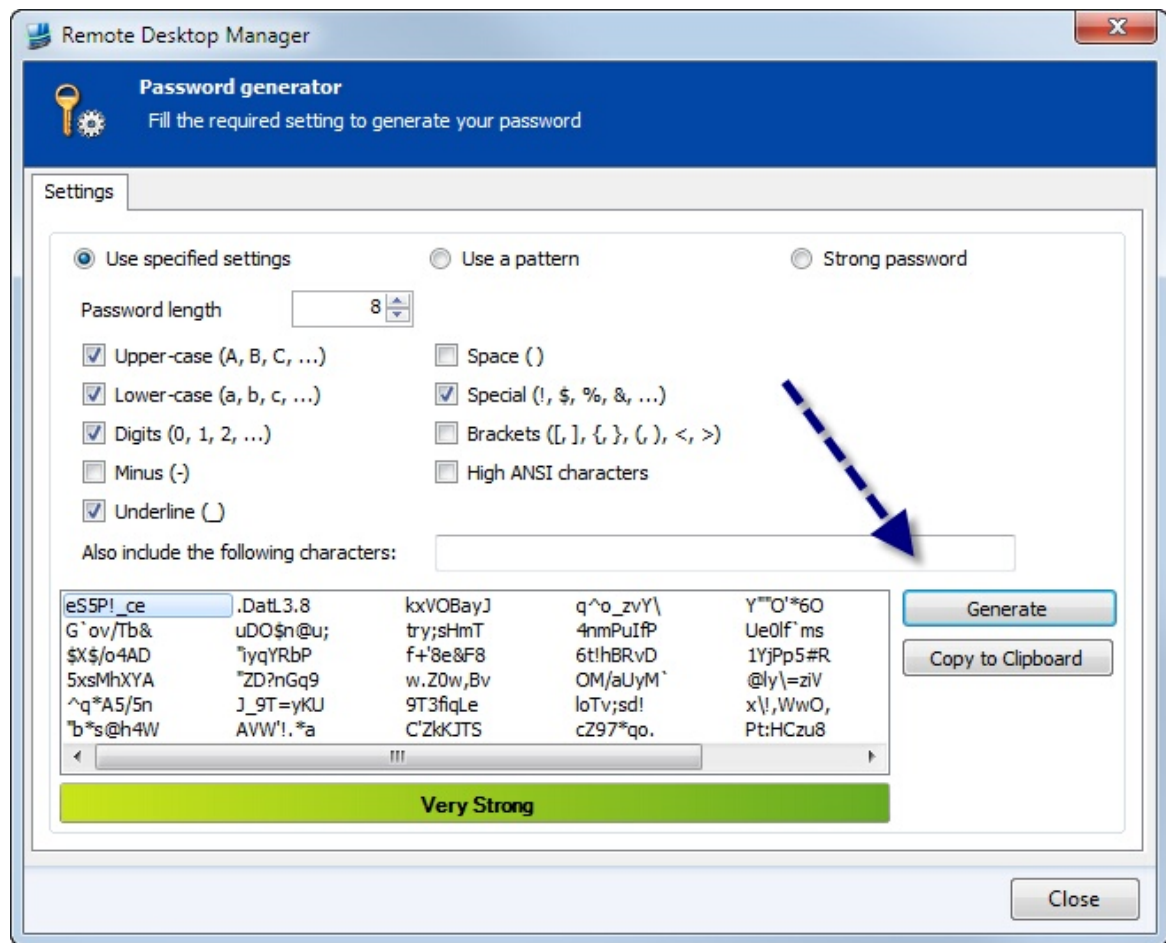
Password Generator is available in **Tools -> Password Generator....**



There are three types of settings :

#### 1. Use the specified settings

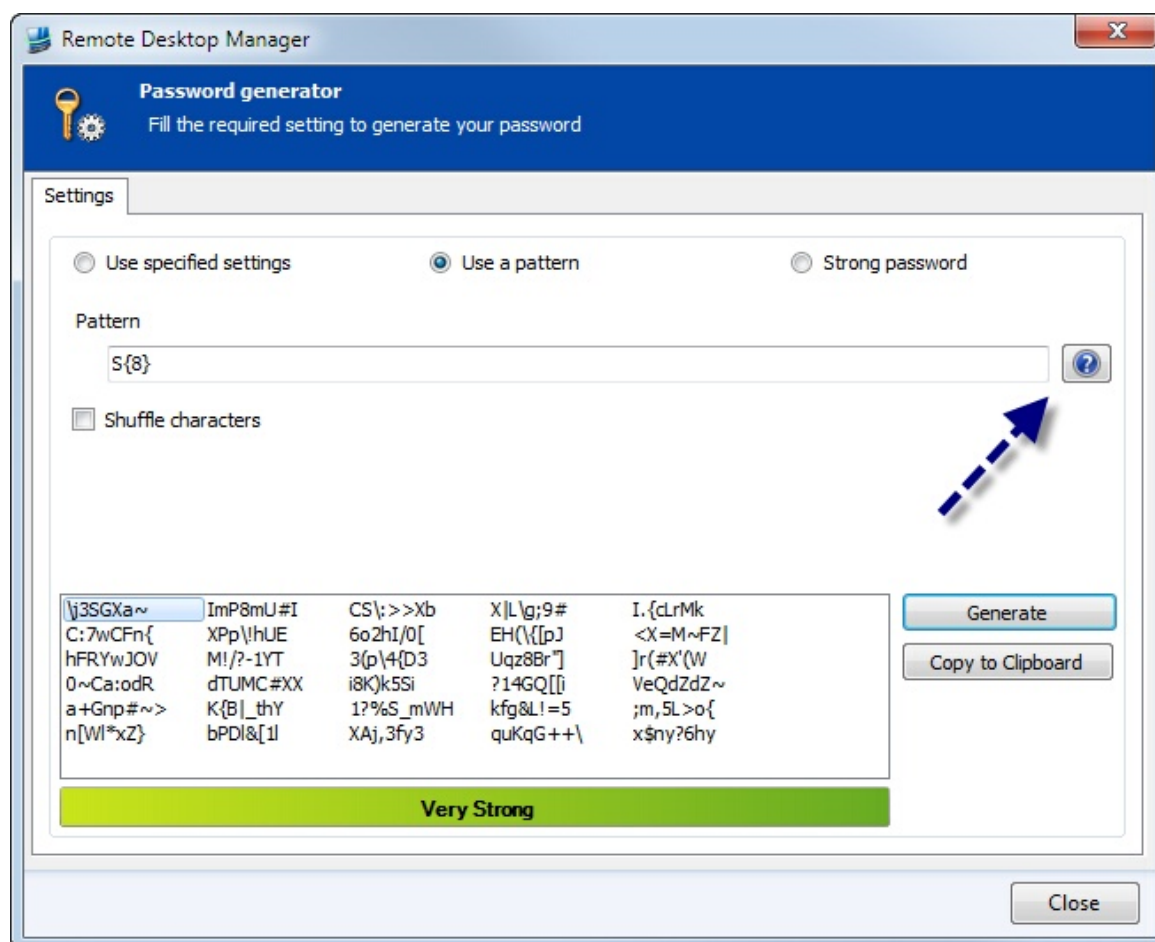
Choose all the character types you desire and generate passwords.



Specified settings

## 2. Use a pattern

Press the question mark button and select any pattern you need to create your passwords.



Pattern

The following are the supported patterns.

Key	Description	Sample
a	Lower-Case Alphanumeric	abcdefghijklmnopqrstuvwxyz 0123456789
A	Mixed-Case Alphanumeric	ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz 0123456789
b	Bracket	()[]{}<>
c	Lower-Case Consonant	bcdfghjklmnpqrstvwxyz
C	Mixed-Case Consonant	BCDFGHJKLMNPQRSTVWXYZ bcdfghjklmnpqrstvwxyz
d	Digit	123456789
h	Lower-Case Hex Character	0123456789 abcdef
H	Upper-Case Hex Character	0123456789 ABCDEF
l	Lower-Case Letter	abcdefghijklmnopqrstuvwxyz
L	Mixed-Case Letter	ABCDEFGHIJKLMNOPQRSTUVWXYZ abcdefghijklmnopqrstuvwxyz
p	Punctuation	,.:;

s	Printable 7-Bit Special Character	!"#\$%&'()*+,-./:;<=>?[\]^_`{ }~
S	Printable 7-Bit ASCII	A-Z, a-z, 0-9, !"#%&'()*+,-./:;<=>?[\]^_`{ }~
u	Upper-Case Letter	ABCDEFGHIJKLMNOPQRSTUVWXYZ
U	Upper-Case Alphanumeric	ABCDEFGHIJKLMNOPQRSTUVWXYZ 0123456789
v	Lower-Case Vowel	aeiou
V	Mixed-Case Vowel	AEIOU aeiou
x	High ANSI	From '~' to U255 (excluding U255)
z	Upper-Case Consonant	BCDFGHJKLMNPQRSTVWXYZ
Z	Upper-Case Vowel	AEIOU
\	Escape (Fixed Char)	Use following character as is
{n}	Escape (Repeat)	Repeats the previous character <i>n</i> times
[x]	Custom character	Define a custom character sequence

### 3. Strong password

Password Vault Manager will generate an 8 character password with mixed case alphanumerics and special characters.

Settings

☐ Use specified settings
☐ Use a pattern
☒ Strong password

1 oMyVe1	0MgFI95_	eL6MI+2K	BJ8I939\$	Y29s<5W9
19YczEQ[	y5ap3^Nj	sC85 7vN	BY4#q08E	61=hcF7J
a_2L2Id6	0Lgd3N1^	~M06LE43	Y5Ih7~3u	0~4o3wBA
>UZ4c3uP	HU50~suF	T)9Fc2Qv	7hLA%dJ6	h22nYY1&
Y:uA73h1	(jS30nxP	V)sPb03U	X5,TCj5g	7Fi9]Q0y
7Ep>Sn34	T6Gh"sL1	rA69=YrQ	6FQzsR9	G+76bS40

Generate

Copy to Clipboard

Very Strong

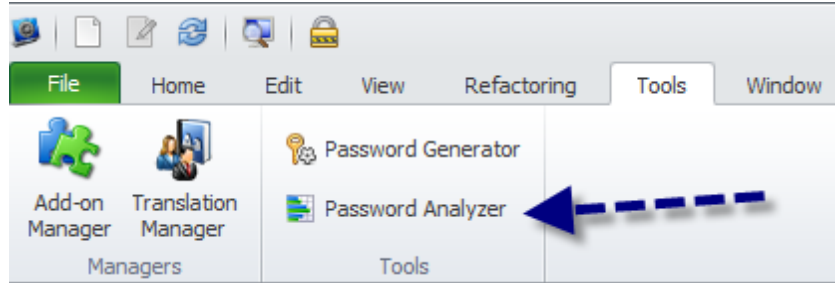
Strong password

## 5.7.4 Password Analyzer

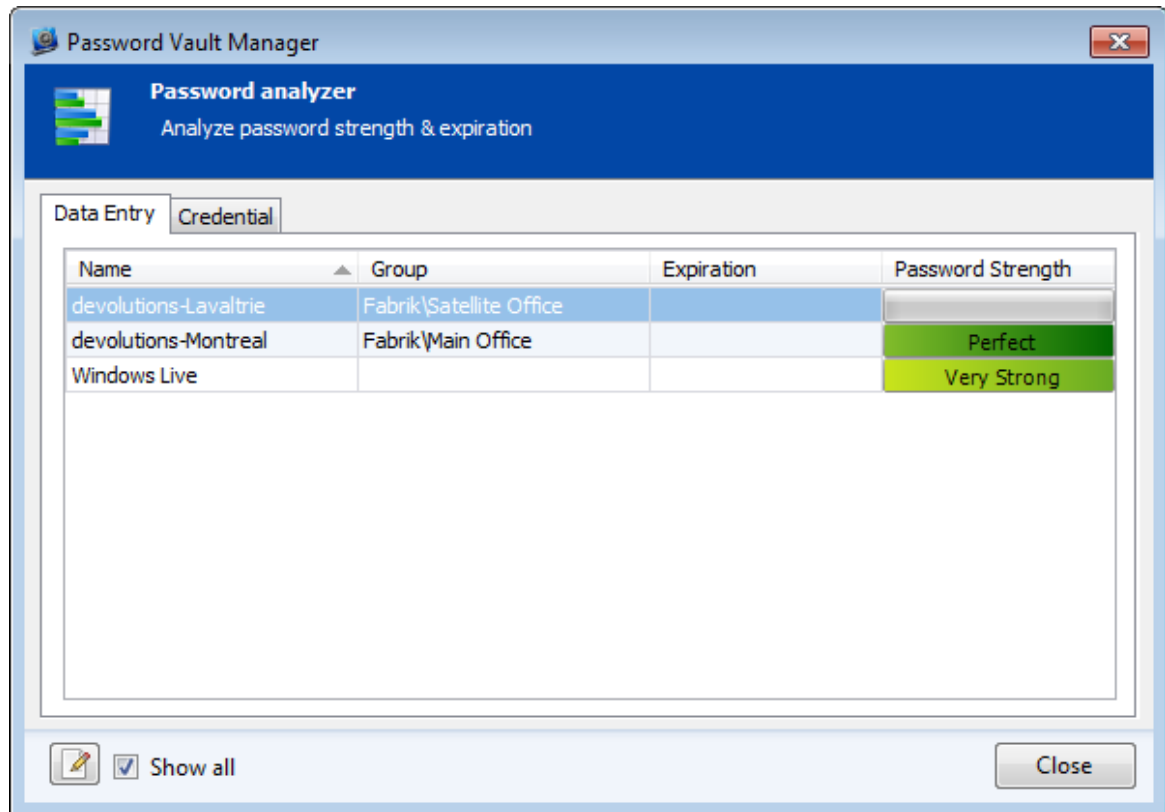
### Description

The password Analyzer will display a strength indicator for all passwords that are stored with your various entries.

It is accessible from from the **Tools->Password Analyzer...** menu



Password Analyzer button in the ribbon



Password Analyzer

## Settings

The dialog displays two tabs : *Data Entry* and *Credential*. In a single glance you can see the strength ratings of your stored passwords.

Two controls can be seen at the bottom left.



**Control highlight**

The button is to open the current entry so you can edit it. The checkbox, when unchecked, will display only entries with actual passwords stored in them.

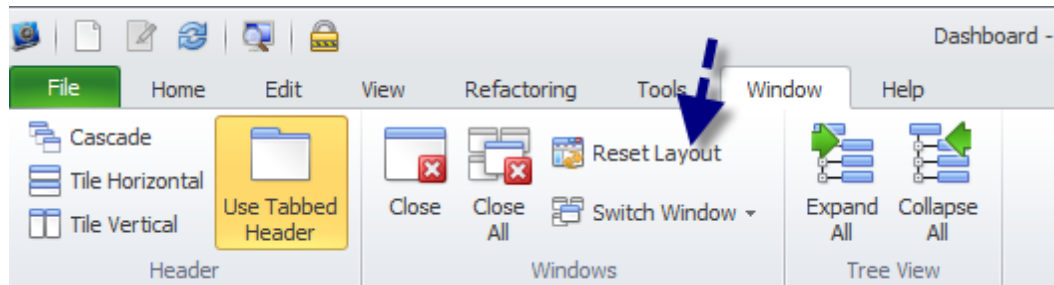
## 5.8 Window

### 5.8.1 Layout

#### Description

The Window ribbon page contains the layout management buttons. You can close one or multiple opened tab page.

The layout of the main form is managed by dragging and docking the different panel. However it's always possible to reset the layout to the default settings.

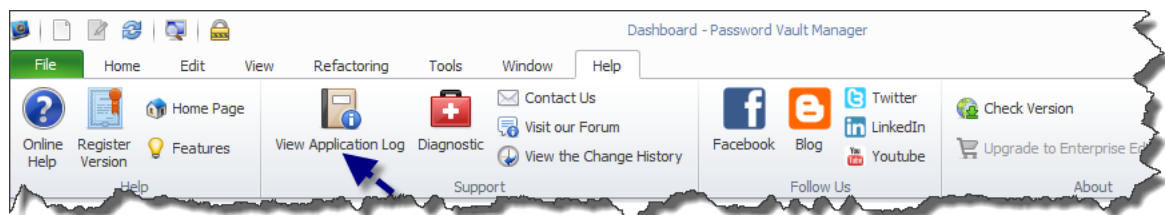


## 5.9 Help

### 5.9.1 Application Logs

#### Description

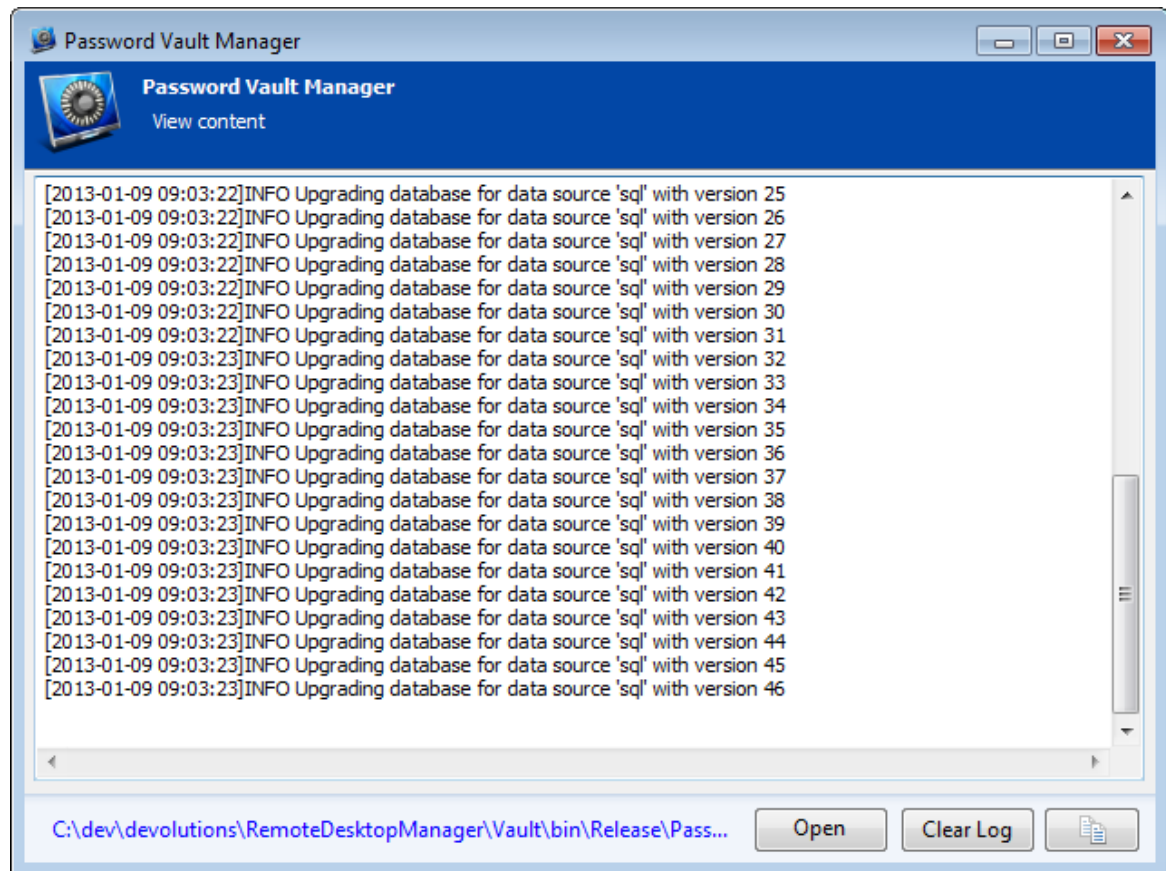
In case of error, you can verify the local application log, which is available from the menu in **Help > View Application Log...**



**View Application Log button**

Those logs are saved in in **%LocalAppData%\Devolutions\RemoteDesktopManager\RemoteDesktopManager.cfg**





View Application Logs dialog

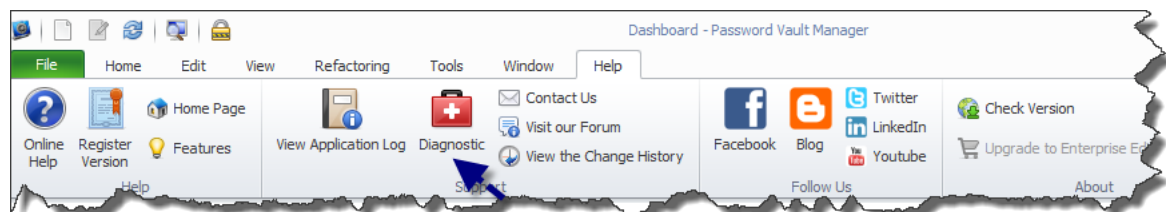
## Increasing the log level

When requested by a Devolutions employee during a support process, you may be asked to increase the log level of the application to a higher level. Please consult [Advanced](#)

## 5.9.2 Diagnostic

### Description

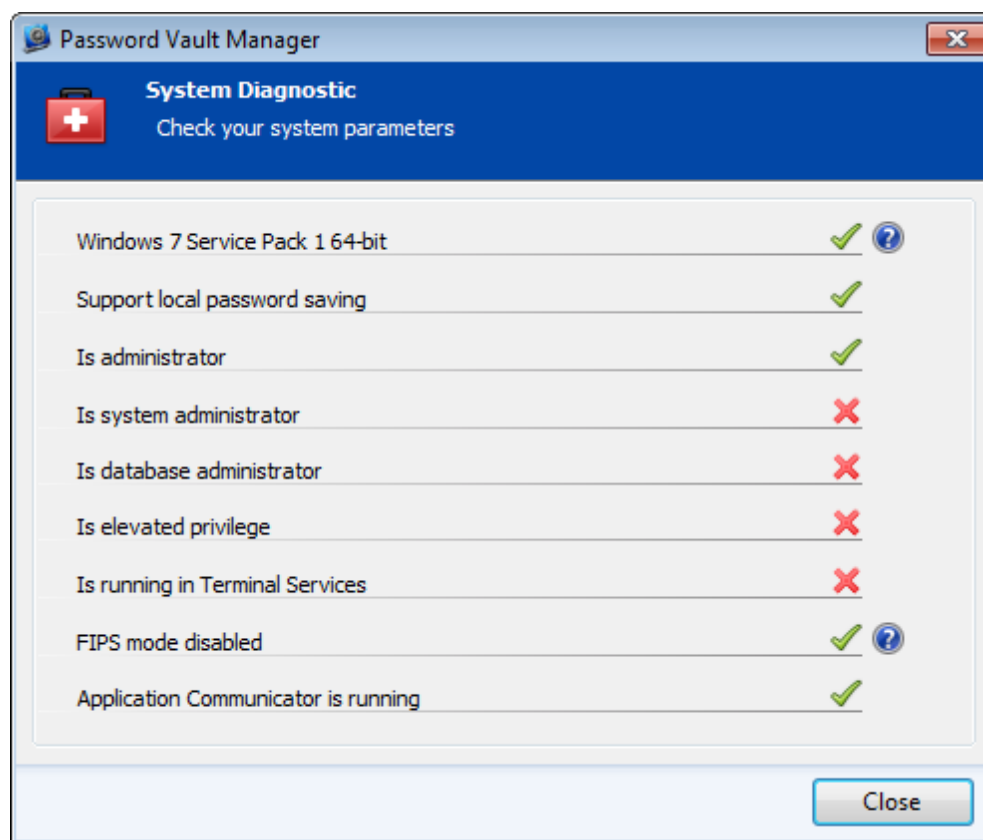
If you encounter a problem, you can run the system diagnostic available from the menu in **Help > Diagnostic...**



System Diagnostic button

This will help us find diagnose the problem that you might have.





System Diagnostic dialog

The administrator item could be the possible source for security problem. This happen often when a user has the SYSDBA or is DB\_OWNER of the SQL Server database.

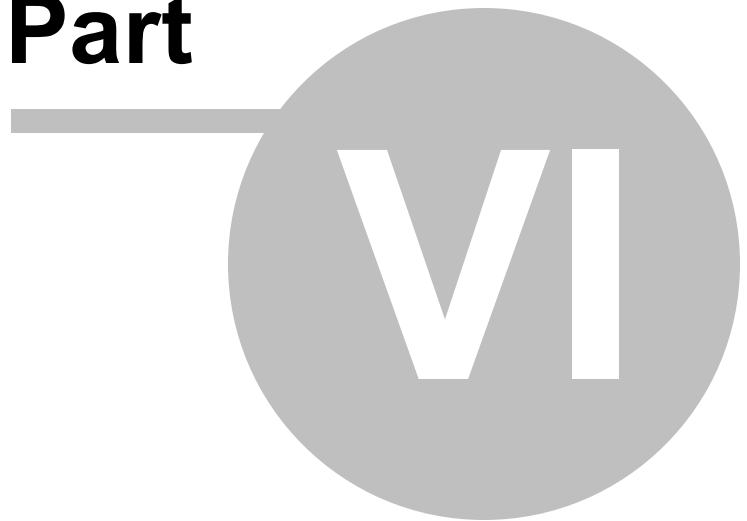
Some other issues could be related to the fact that the application is running in Terminal Services. However Password Vault Manager is fully compatible with Terminal Services.



Please read the [Troubleshooting](#) topic, it lists error messages and could contain the fix/workaround for your problem.

# Support/Resources

**Part**



## 6 Support/Resources

### 6.1 Command Line Arguments

#### Usage

Password Vault Manager can be executed in a command line. However, some features are only available in the Enterprise edition.

**usage:** PasswordVaultManager.exe [parameters]

Parameters	
/Silent	Execute the application minimized in a system tray icon. This option cannot be combined with other parameters.
/Datasource:{datasource id}	Specify the data source id (available in the Advanced Tab of the session).
/Session:{session id};{session id}	Specify one or more session IDs (available in the Advanced Tab of the session)
/ChangePassword:{new password}	Change the session password. Only available for Remote Desktop sessions and embedded passwords. The data source ID and the session ID are required.
/RegisterUser:"{registration user}"	Change the Password Vault Manager username. The value must be in double quotes.
/RegisterSerial:"{serial number}"	Change the Password Vault Manager serial number. The value must be in double quotes.
/Template:{local template ID} /Host: {host name}	Open the template with the specified host name.

### 6.2 Technical Support

#### Standard Support plan

Support is solely through our online forums at <http://forum.devolutions.net/>.

#### Extended and Premium support plans

Subscribers of a paid support plan receive an email address and a plan ID. You should send your support requests to the appropriate email address and provide your plan ID on the subject line.

You are also encouraged to find information and ask questions in our forums at <http://forum.devolutions.net/>. They contain years of relevant information and have the benefit of being enriched for the whole community when we post an answer.



Please consult our [Support Policy](#) for more information.

## 6.3 Follow Us

### Overview

Get the hottest information about our products - tips and tricks, case studies and new release announcements!

This is not a marketing newsletter. We focus on the issues that matter to you, whether you're looking for up-to-the-minute software tutorials, additional outside resources, or a peek at how others are using our products.

Links		
	Facebook	<a href="http://facebook.remotedesktopmanager.com">http://facebook.remotedesktopmanager.com</a>
	LinkedIn	<a href="http://linkedin.remotedesktopmanager.com">http://linkedin.remotedesktopmanager.com</a>
	RSS feeds	<a href="http://rss.remotedesktopmanager.com">http://rss.remotedesktopmanager.com</a>
	Twitter	<a href="http://twitter.remotedesktopmanager.com">http://twitter.remotedesktopmanager.com</a>
	YouTube	<a href="http://youtube.remotedesktopmanager.com">http://youtube.remotedesktopmanager.com</a>
	Blog	<a href="http://blog.remotedesktopmanager.com">http://blog.remotedesktopmanager.com</a>
	Google+	<a href="http://plus.remotedesktopmanager.com/">http://plus.remotedesktopmanager.com/</a>
	Spicework	<a href="http://spice.devolutions.net">http://spice.devolutions.net</a>
	Forum	<a href="http://forum.devolutions.net">http://forum.devolutions.net</a>

## 6.4 Troubleshooting

### Description

Consult this section to get more information about:

- [General](#)
- [Performance](#)
- [SQL Server](#)

### 6.4.1 General

#### Errors

***“Could not load file or assembly “System.EnterpriseServices.Wrapper.dll or one of its dependencies. The system cannot find the path specified.”***

This error is due to a corrupted Microsoft's .NET Framework 2.0 installation. We recommend that you try and repair the .NET Framework, or follow the instructions in the Microsoft Knowledge base

article "[How to repair an existing installation of the .NET Framework](#)".

### ***My mapped network drive(s) are not available when using Run As Administrator to launch Password Vault Manager***

This is because of User Access Control (UAC), a built-in security layer of Windows. Effectively you are considered a different user with different preferences, the Mapped network drives being one such preference. In order to have the same mapped drives you have a few options

1. Using an elevated command prompt, recreate the same mapped drive(s) using the `NET USE {DRIVENAME} {SHARENAME} /PERSISTENT:YES` command
2. Modifying the registry to link connections between the accounts , see <http://support.microsoft.com/kb/937624>.

## **6.4.2 Performance**

### **Startup**

If you experience slow startup times there are a few things to try in order to reduce the time before the application is available for use. Please note that this is exceptional and occurs when your data source contains a great number of connections.

#### ***Slow startup on machines that are not connected to the internet.***

For your security, we "sign" our program with a code signature. This results in the validity of the signature being checked at application startup. If the machine is not connected to the internet the application will wait for a response until a timeout occurs. For a detailed explanation and a workaround please read [Improving Application Start Up Time](#)

### **Refresh**

This category affects all data source refreshes, therefore also the initial load at program startup.

#### ***Heavy usage of custom images***

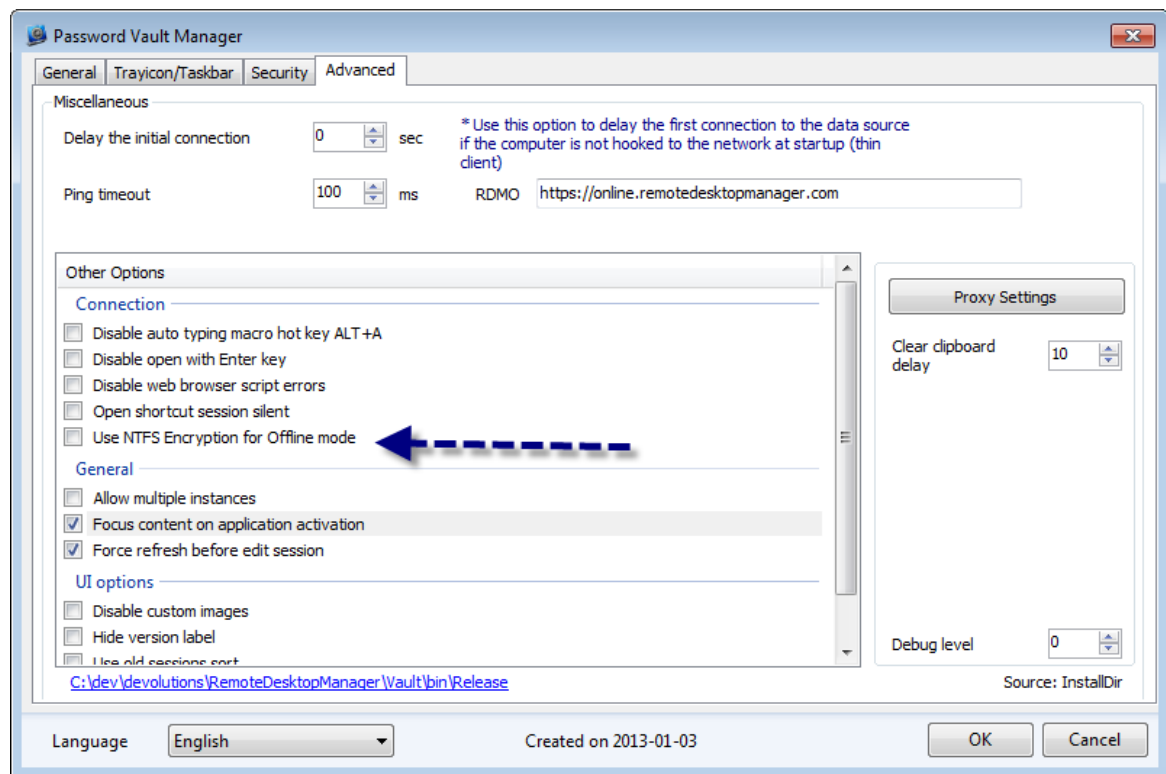
Custom images need to be stored in the data source, this results in the size of the configuration becoming problematic if there are too many entries using them. If that becomes the case it would be better to revert to built-in images.

#### ***Heavy usage of RTF description***

RTF in itself is not a real issue until you decide to embed images in the description. This results in the same problem as using custom images, namely the size of the configuration becoming too large. If that becomes the case, reduce the size of your descriptions.

#### ***Offline mode activated for data source***

When you enable Offline mode ([Data Source Settings](#) or [Overview](#)), a local file is created and is kept in sync with the data source. This file is encrypted using the Windows built-in NTFS encryption which can cause delays in refreshing the local data file. This is rarely the case but seems to happen on computers on a domain which has been hardened by the network administrator. You can turn off usage of NTFS encryption in the application options



Advanced application options

### 6.4.3 SQL Server

#### Errors

##### *Unable to connect to SQL Server*

On a new SQL Server installation, remote connections must be allowed manually. Follow these [Directions](#) to enable connectivity.

## 6.5 Best Practices

### 6.5.1 Backups

#### Description

It is recommended to always have a current backup of your data source. Since we support a wide range of data stores, you should use the best solution for your chosen data source.



#### Xml

Our recommended backup solution is to subscribe to our [Online Backup Service](#)



#### Microsoft Access

Our recommended backup solution is to subscribe to our [Online Backup Service](#)



## Microsoft Sql Server

We recommend creating a maintenance plan to perform automatic backups regularly. This video is a good start on the subject : [Setting up a Maintenance Plan to Backup Databases](#)

## 6.6 Tutorials

Enter topic text here.

### 6.6.1 Overview

#### Description

Our tutorials are published on [Devolutions YouTube channel](#). We have three main categories of tutorials:

- [Overview](#): Brief presentation of a product.
- [Getting Started](#): Procedure to get up and running in a quick fashion.
- [Spotlight On...](#): Detailed presentation of a specific aspect of our products.

Obviously some tutorials will not fit in one of these categories, but our focus is to deliver quality information as soon as possible after the release of a new or modified feature.


Please use our forums if documentation is missing or plain wrong, we will do our best to correct the situation.

### 6.6.2 Getting Started

#### Description

Please consult [our tutorials page](#).

Getting Started videos should present a step-by-step sequence to start using a product. They differ from our "Spotlight On..." series in that they are targeted on significant feature of the product, rather than on a piece of a whole.

Getting Started...	Description	Link
with Password Vault Manager	Learn how to quickly and easily set up Password Vault Manager and get started with your team.	 Watch Video

Please consult [our tutorials page](#).

### 6.6.3 Spotlight On...

#### Description

This video category is destined to contain a great number of short tutorials that provide information on a really specific aspect or feature of Password Vault Manager.

Ultimately, all longer videos will be replaced by a series of **Spotlight on...** tutorials.

Our [Getting Started](#) topic contains a sequence of steps to follow to go through the initial setup under various conditions. Please refer to it for the best sequence for your environment.

#### Spotlight On...

Title	Description	Link
... User Interface	Learn how to manipulate the user interface elements of Password Vault Manager and adapt it according to your preferences.	Coming soon
... Data Sources		Coming soon
... Offline Mode		Coming soon
... Search/Filter		Coming soon
... Quick Connect		Coming soon
... Entries		Coming soon
... Security Groups		Coming soon
... Templates and Default Settings		Coming soon